



Munis Revenues

*Major Enhancements
Version 10.1
January 16, 2012*

TABLE OF CONTENTS

Major Enhancements – Munis® Version 10.1 Revenues	4
Munis Ribbon.....	4
Munis Web Parts	6
Financial Overview Web Part.....	6
Meetings Web Part.....	10
Accounts Receivable and General Billing.....	12
Accounts Receivable Enhancements.....	12
Charge Codes.....	12
Customers.....	12
Customer Statements.....	13
Summary Report.....	13
Workflow Business Rules.....	14
General Billing Enhancements	15
Invoice Entry	15
Invoice Entry and Proof	17
Invoices.....	17
Print Invoices	18
Print Statements	18
Recurring Invoices	19
Workflow Business Rules.....	19
Business Licenses	21
Business Accounts.....	21
Generate Accounts Receivable	21
Inactivate Expired Licenses.....	21
Print Renewals	22
Permits and Code Enforcement.....	23
Application Entry	23
Complaint/Violation Codes	24
Contractors	25
Event Notifications	25

Inspection Entry	26
Inspection Types.....	26
Location Master	27
Permit Types	27
Reason Codes	27
Resolution/Enforcement Steps.....	28
Munis Self Service	29
Citizen Self Service Enhancements.....	29
Account Linking.....	29
Payments Administration.....	31
Permits and Code Enforcement	34
Centrals	36
Permits Central	36
Property Central	37

Major Enhancements – Munis® Version 10.1 Revenues

This document provides an overview of the major enhancements made to revenues programs for Munis Version 10.1, as well as those for the revenues programs available in Citizen Self Service (CSS). The Munis Revenues product contains General Revenues, Property Revenues, and Other Applications:

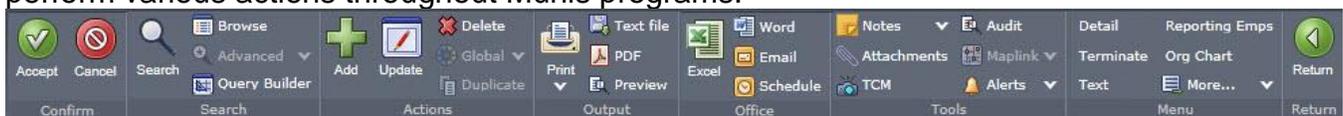
- General Revenues includes Accounts Receivable, Animal Licenses, General Billing, Maine Vehicle Registration, Parking Tickets, Slip Reservations, Vehicle Stickers, and Virginia State Income Tax.
- Property Revenues includes Accounts Receivable, Business Licenses, Central Property, Permits and Code Enforcements, Property Tax Billing, and Utility Billing.
- Other Applications include Centrals Processing, Human Services, Jury Selection, Risk Management, and Voter programs.

Please refer to the Version 10.1 Munis Release Notes on the Munis Knowledgebase (<http://muniskb.tylertech.com/search.aspx>) for information regarding state-specific updates and all other changes not covered in this document. Utility Billing enhancements are provided in *Major Enhancements Version 10.1 Utility Billing*.

If your organization uses the Tyler Dashboard, Munis Version 10.1 is available in a Web-based interface called GWC-SL. The GWC-SL screens are very similar in function to desktop versions of Munis; however, the screens open in your Web browser using Microsoft® Silverlight™ technology. The content of this document is based on the GWC-SL interface.

Munis Ribbon

If your organization uses the GWC-SL interface, the Munis ribbon replaces the Munis toolbar. This ribbon contains tabs, which in turn, contain groups of related buttons that allow you to perform various actions throughout Munis programs.

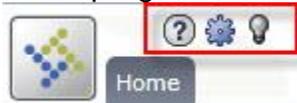


The groups on the Munis ribbon are as follows:

- Confirm - Accept, Cancel.
- Search - Search, Browse, Advanced, Query Builder. Click the down arrow for the Advanced button to access advanced search options.
- Actions - Add, Update, Delete, Global, Duplicate. Click the down arrow for the Global button to view options.

- Output - Print, Text File, PDF, Preview.
- Office - Excel, Word, Email, Schedule.
- Tools - Notes, Attachments, TCM, Audit, MapLink, Alerts. Click the down arrow for the Notes, MapLink, and Alerts buttons to access specific options for each.
- Menu - Options specific to managing data in the active program and options for accessing related programs. Click the down arrow for the More button to view a complete list of menu options.
- Return - Closes the current screen. To close a program, close the Internet browser window.

In the program banner, the Munis Help, Settings, and Enhancements buttons are available.



These buttons provide the following options specific to the active program:

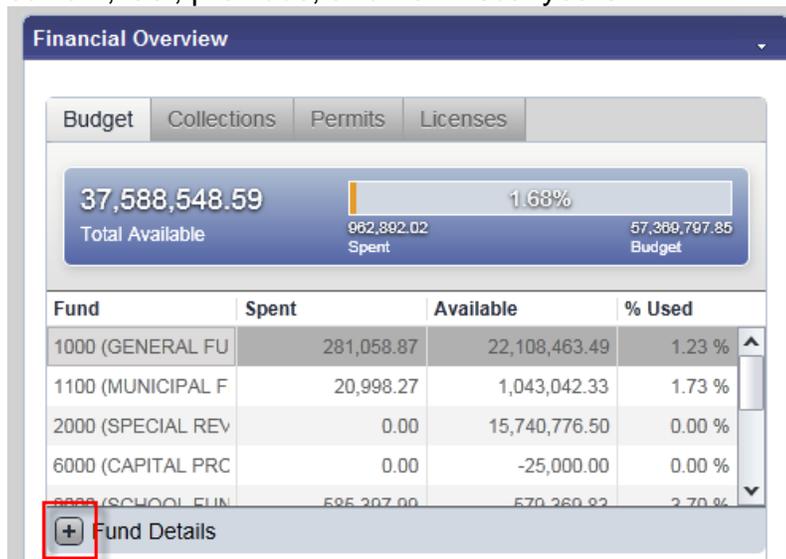
- Help - Provides the Munis online help content, displays the Munis KnowledgeBase search screen with a list of documents related to the active program, and provides About Munis details.
- Settings - Provides the Customizable Field Label and View Database Column options.
- Enhancements - Displays the most recent enhancements to the active program.

Munis Web Parts

Financial Overview Web Part

The Financial Overview web part displays high level financial information and includes tabs for Budget, Collections, Permits, and Licenses. On each tab you can view a graph of line item details for the category.

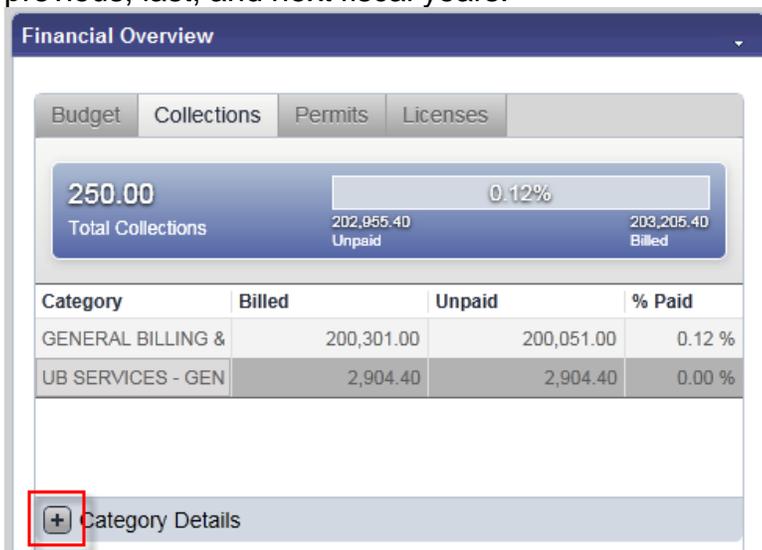
The Budget tab displays your total available budget, as well as a progress bar that shows the total amount and the percentage that has already been spent. Select a fund in the table and click the plus sign beside Fund Details to view a line graph depicting spending trends for the current, last, previous, and next fiscal years.



You can select a different fund from the list and you can choose which years are included in the graph. You can view spending trends for each function within the fund by selecting a different function from the list.



The Collections tab displays the total amount of money you have collected, as well as a progress bar showing the amount and percentage of billed amounts that remain unpaid. Click the plus sign next to Category Details to view a graph of collected amounts for the current, previous, last, and next fiscal years.



Financial Overview ▾

Budget Collections Permits Licenses

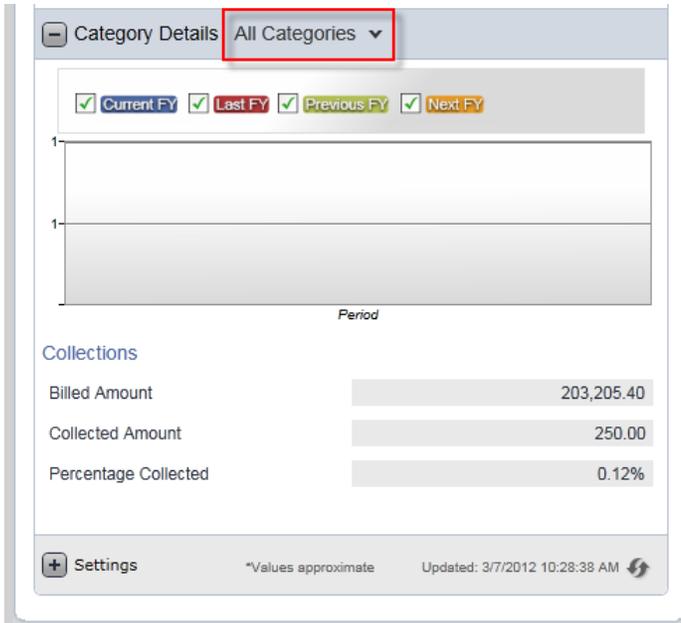
250.00 0.12%

Total Collections 202,955.40 Unpaid 203,205.40 Billed

Category	Billed	Unpaid	% Paid
GENERAL BILLING &	200,301.00	200,051.00	0.12 %
UB SERVICES - GEN	2,904.40	2,904.40	0.00 %

+ Category Details

Select a bill category from the list to view collected amounts for that category.



Category Details **All Categories** ▾

Current FY Last FY Previous FY Next FY

1
1

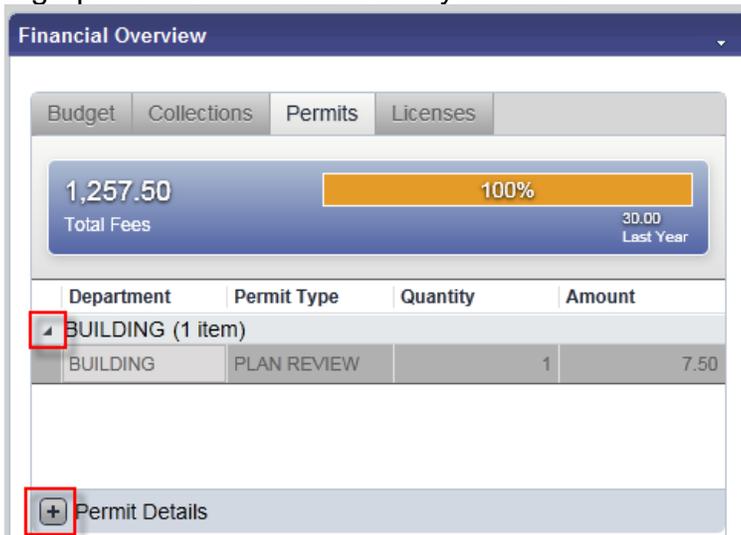
Period

Collections

Billed Amount	203,205.40
Collected Amount	250.00
Percentage Collected	0.12%

Settings *Values approximate Updated: 3/7/2012 10:28:38 AM

The Permits tab displays the total amount of permit fees collected, as well as a progress bar depicting the amount and percentage collected. Click the arrow next to a department to view or hide a list of permit types for that department. Click the plus sign beside Permit Details to view a graph of collected amounts by district.



Financial Overview ▾

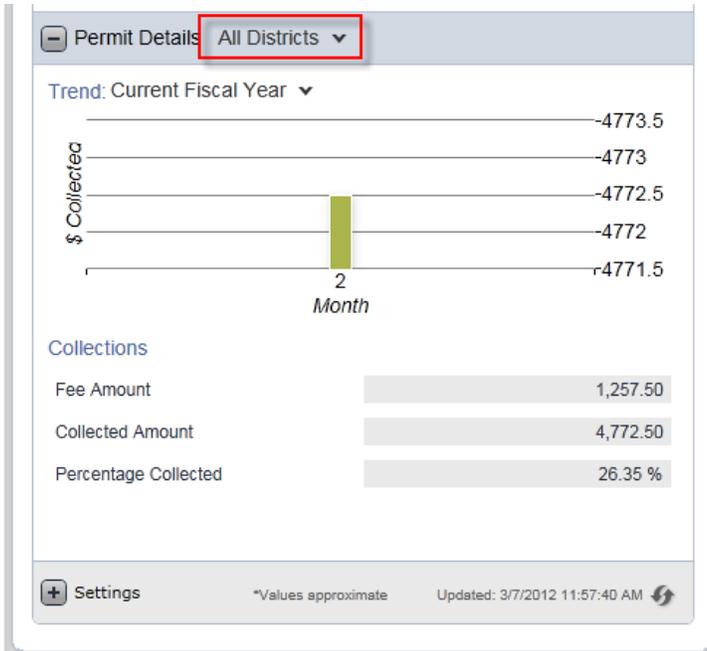
Budget Collections **Permits** Licenses

1,257.50
Total Fees 100% 30.00
Last Year

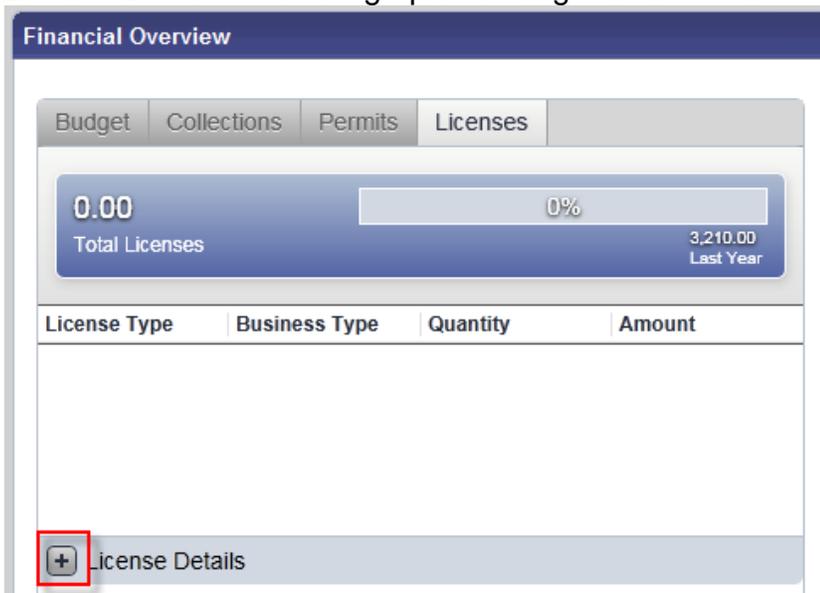
Department	Permit Type	Quantity	Amount
▾ BUILDING (1 item)			
BUILDING	PLAN REVIEW	1	7.50

+ Permit Details

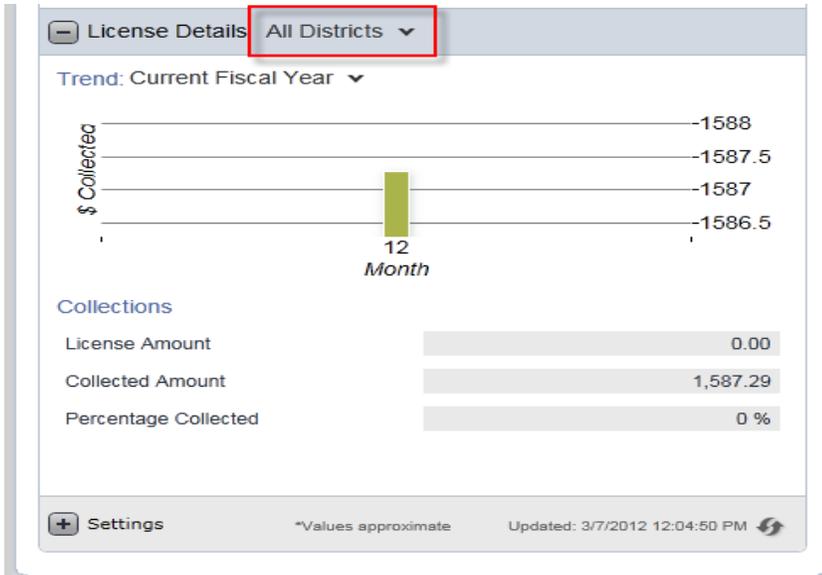
You can select a specific district for which to view collection amounts from the list.



The Licenses tab displays the total license fees collected, as well as a progress bar depicting the amount and percentage of fees collected in the last year. Click the plus sign beside License Details to view a graph showing amounts collected by district.

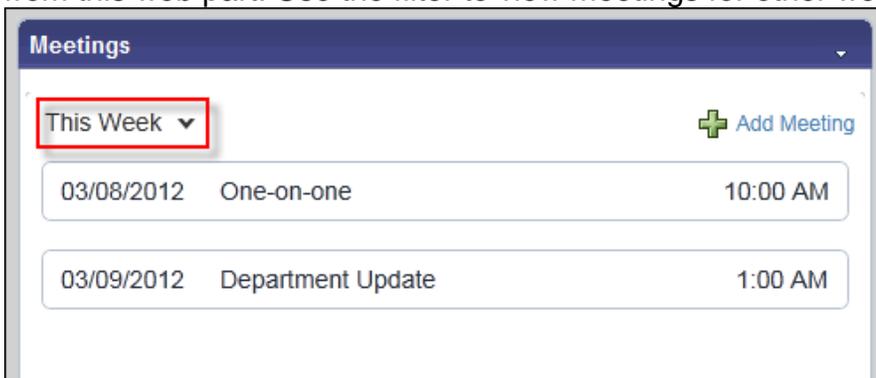


You can select the district for which to view collection amounts from the list.



Meetings Web Part

The Meetings web part allows you to view information about meetings that are scheduled for your organization, including agendas and discussions. You are also able to schedule meetings from this web part. Use the filter to view meetings for other weeks or months.



Meetings ▾

This Week ▾ + Add Meeting

03/08/2012	One-on-one	10:00 AM
03/09/2012	Department Update	1:00 AM

When you click on a meeting, the web part displays agenda items and comments for the meeting. Click Add Item to add an agenda item; click Comments to view comments about an agenda item; and click Add Comment to add a new comment. You can use the navigation controls at the bottom of the web part to view other agenda items for the meeting. Click Print or Email to print or e-mail the agenda item.

Meetings

Budget Discussion ✕
3/8/2012 11:00 AM

Agenda (1 Items) + Add Item

Finance update

Comments

TYLERSarah.hibbard 03/07/2012 12:59 PM
This portion requires a projector

+ Add Comment

⏪ 1 ⏩ Print Email

+ Settings Updated: 3/7/2012 12:48:14 PM ↻

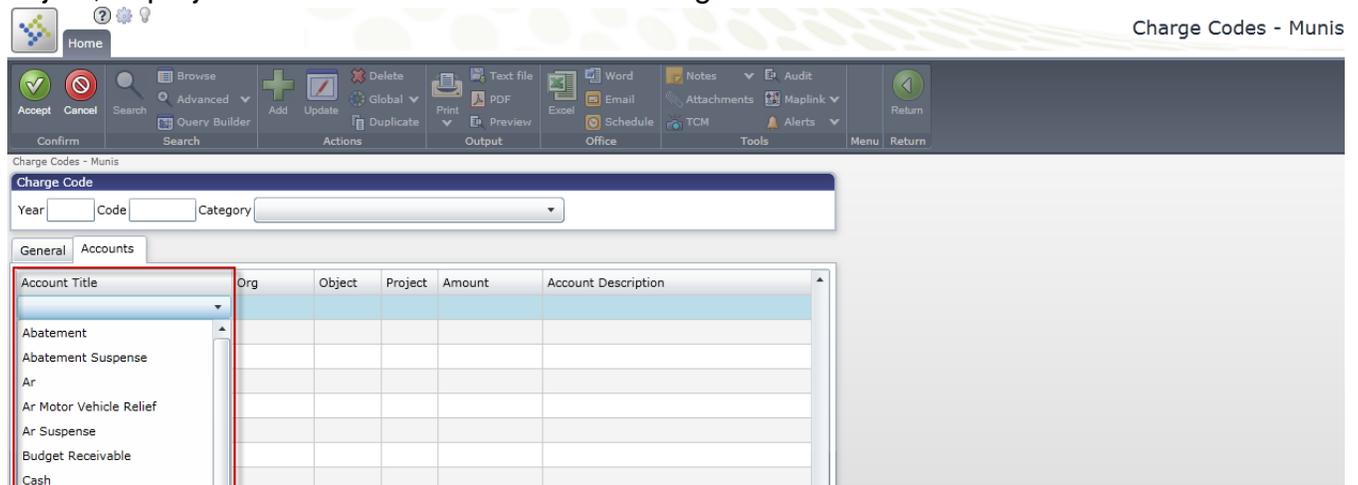
Accounts Receivable and General Billing

This section contains major enhancements made to Accounts Receivable and General Billing programs or processes for Munis Version 10.1.

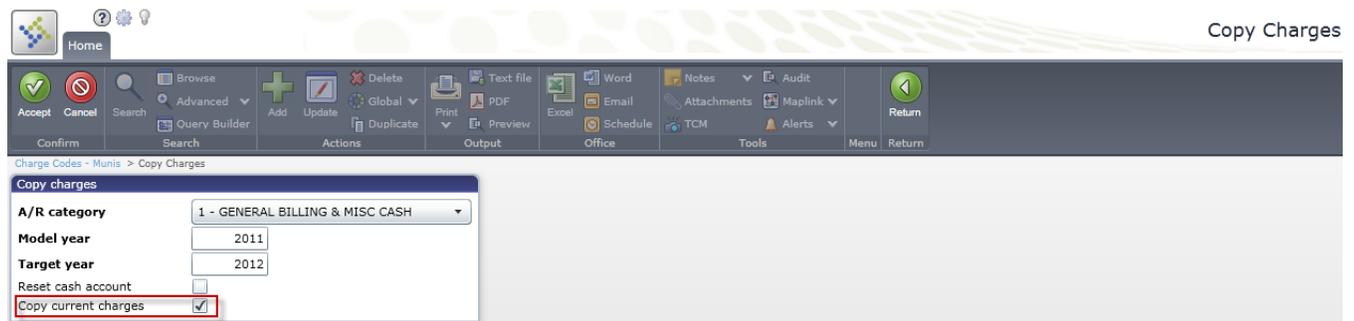
Accounts Receivable Enhancements

Charge Codes

Program functionality was added to search for charge codes based on general ledger org, object, or project codes on the Accounts tab using the Account Title list.

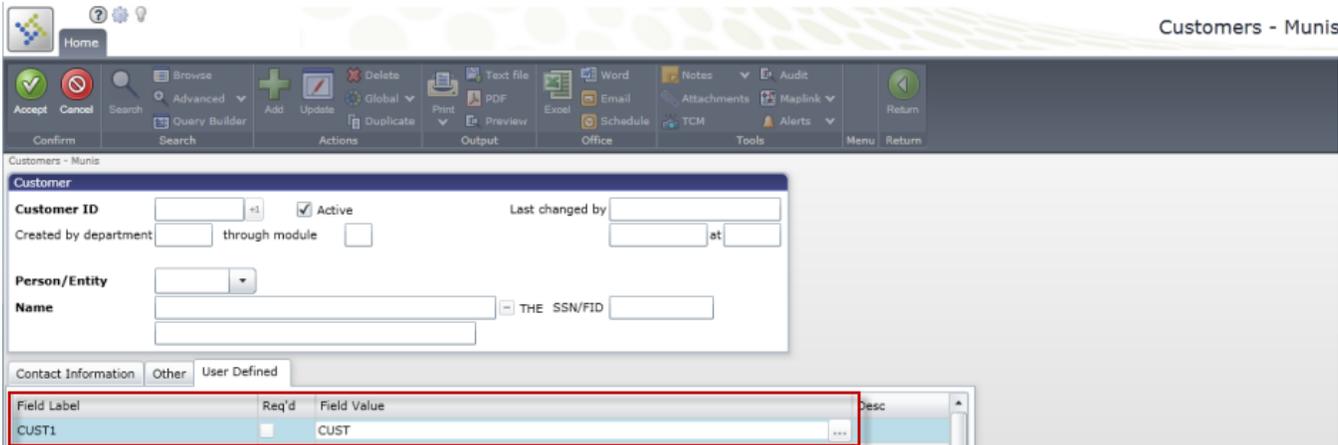


The Copy option allows you to copy only those current records are selected. You can copy one charge code or multiple charge codes. Click Duplicate on the ribbon to access the Copy Charges screen.



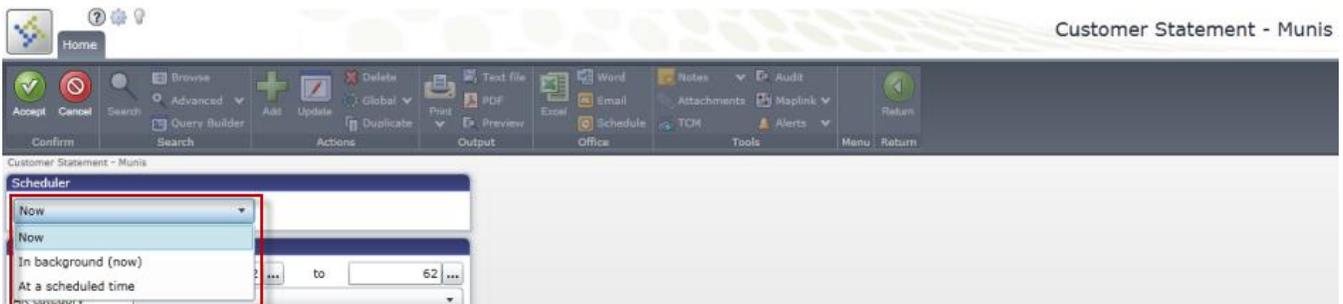
Customers

You can now search for customers by user-defined fields (UDFs). Click the User Defined Field tab and assign search values.



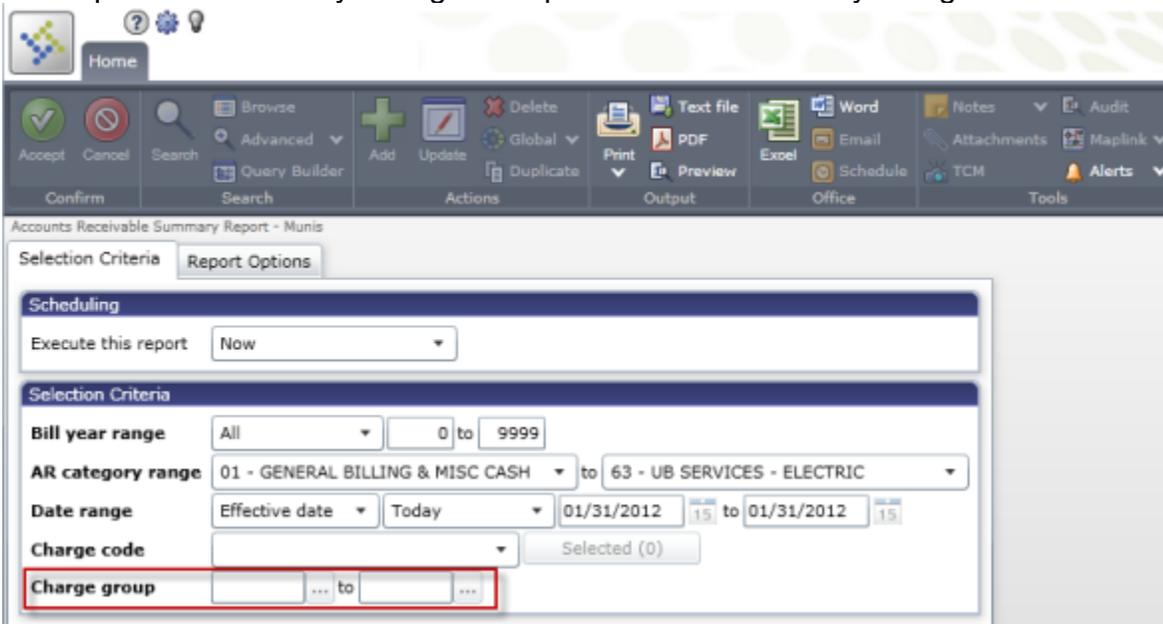
Customer Statements

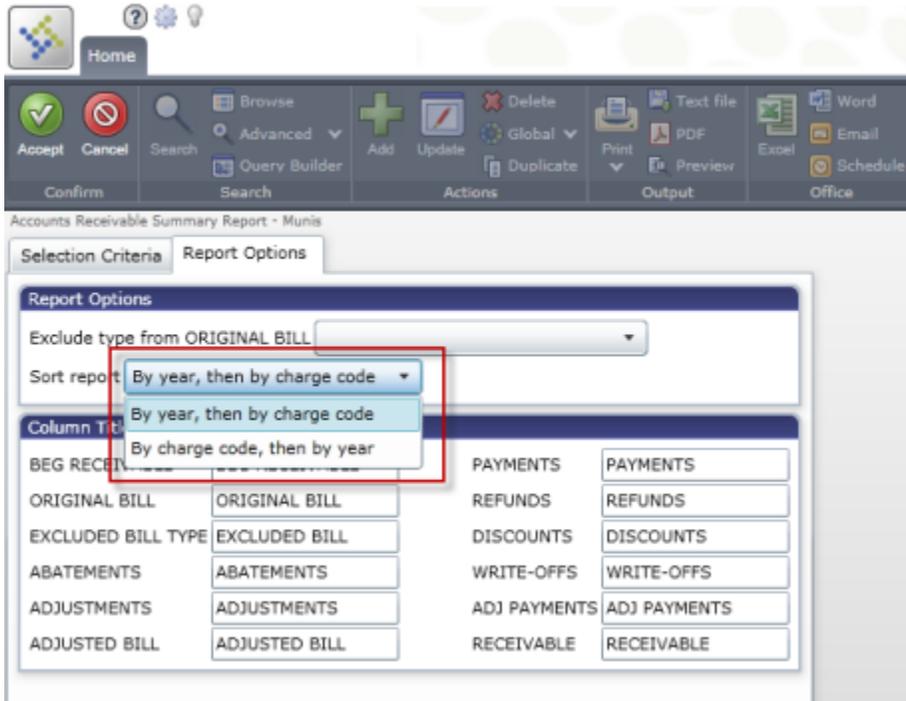
Customer Statements uses Munis Scheduler functionality to define when the report will be generated.



Summary Report

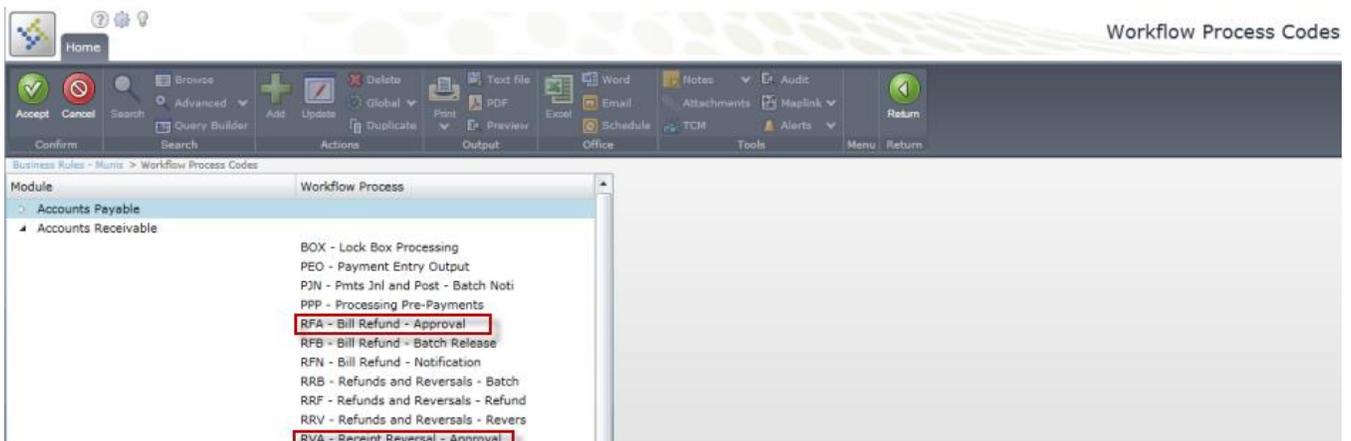
The report can be run by Charge Group and can be sorted by charge code and then by year.





Workflow Business Rules

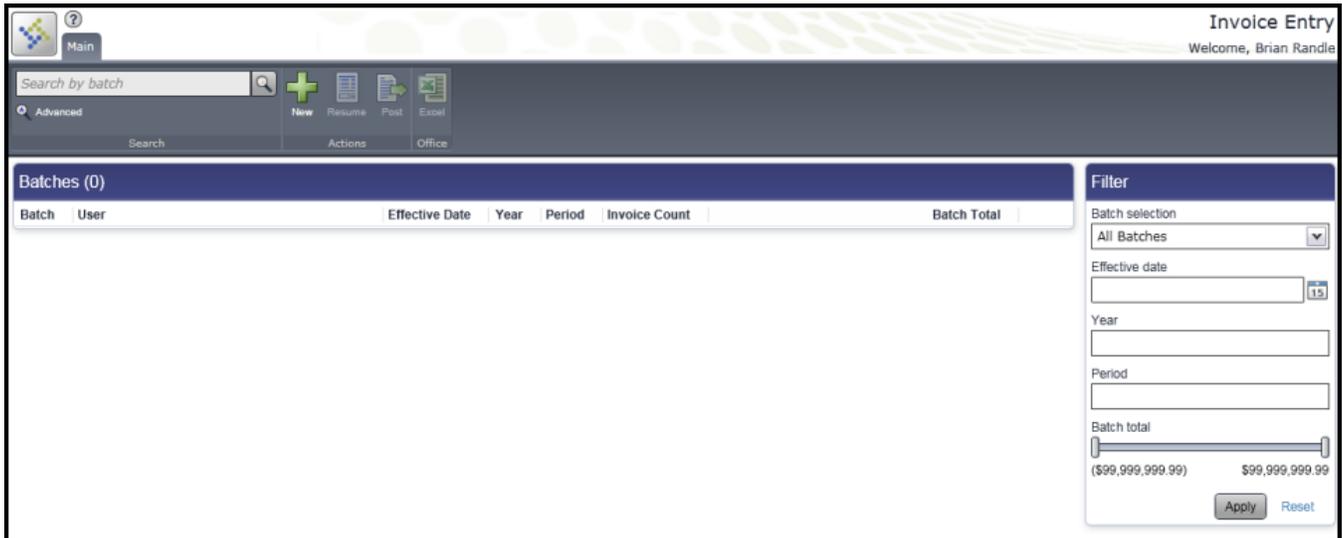
The following Workflow approval business rules are available to provide workflow for the refund and receipt reversal processes: Business rules RFA - Bill Refund Approval and RVA - Receipt Reversal Approval.



General Billing Enhancements

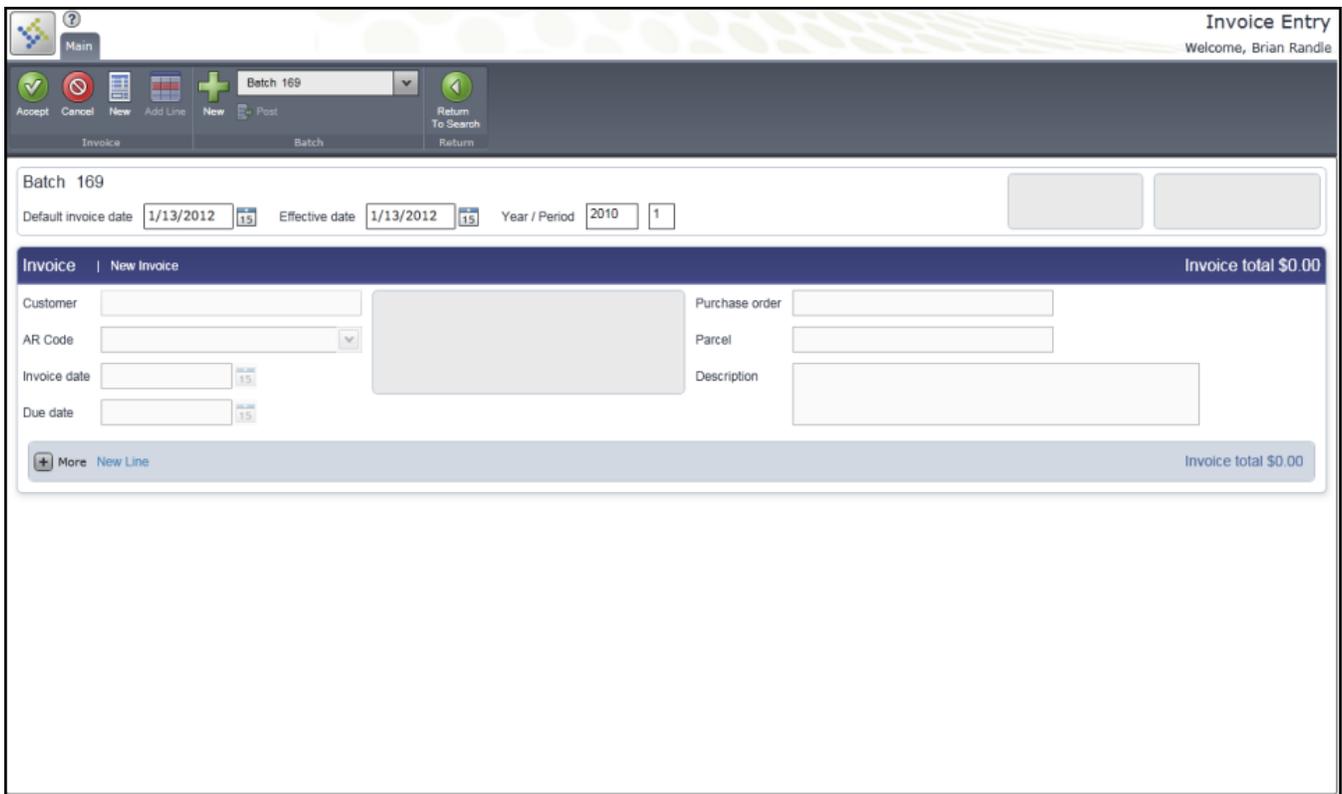
Invoice Entry

The Invoice Entry program creates general billing invoices in batch mode, and subsequently proofs and posts the invoices to bill customers for general revenue receivables.



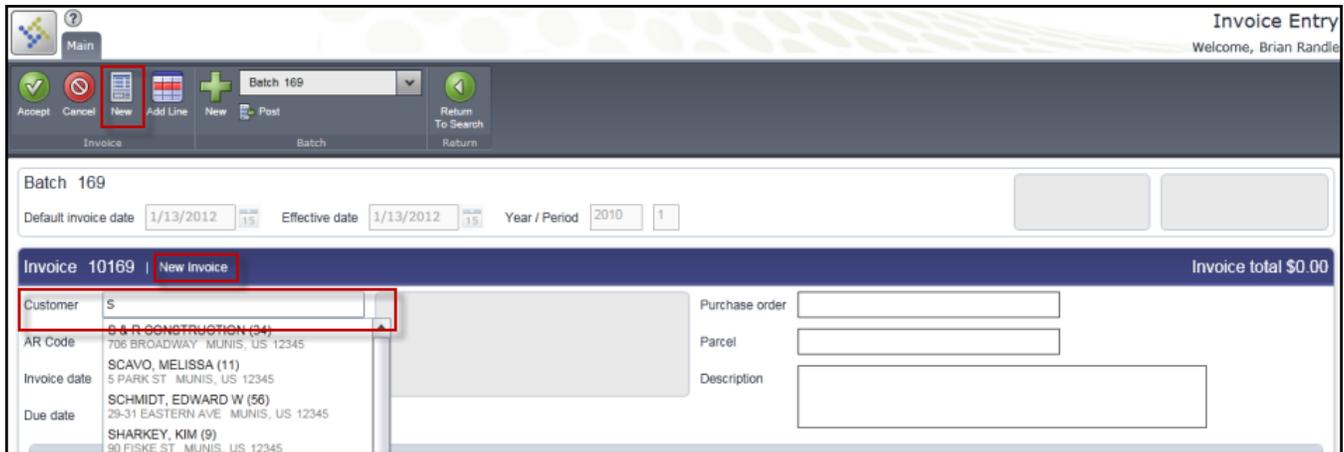
The screenshot shows the 'Invoice Entry' main interface. At the top right, it says 'Welcome, Brian Randle'. Below the header is a search bar labeled 'Search by batch' and a toolbar with buttons for 'New', 'Resume', 'Post', and 'Excel'. The main area contains a table titled 'Batches (0)' with columns: Batch, User, Effective Date, Year, Period, Invoice Count, and Batch Total. To the right of the table is a 'Filter' panel with fields for 'Batch selection' (set to 'All Batches'), 'Effective date' (with a calendar icon), 'Year', 'Period', and 'Batch total' (with a slider and values \$99,999,999.99 and \$99,999,999.99). 'Apply' and 'Reset' buttons are at the bottom of the filter panel.

Click the New button on the Actions menu to add a new batch.



The screenshot shows the 'New Invoice' screen for 'Batch 169'. The top toolbar includes 'Accept', 'Cancel', 'New', 'Add Line', 'New', 'Post', 'Return To Search', and 'Return'. Below the toolbar, the 'Batch 169' section has input fields for 'Default invoice date' (1/13/2012), 'Effective date' (1/13/2012), and 'Year / Period' (2010 / 1). The 'Invoice' section has a header 'New Invoice' and 'Invoice total \$0.00'. It contains fields for 'Customer', 'AR Code', 'Invoice date', 'Due date', 'Purchase order', 'Parcel', and 'Description'. At the bottom, there is a '+ More New Line' button and another 'Invoice total \$0.00' label.

To create the invoice data, you can either click the New button on the Invoice menu or click the New Invoice link. Enter a Customer ID number or simply type the first letter in the customer's last name to pull up a list of customers.



Invoice Entry
Welcome, Brian Randle

Batch 169

Default invoice date 1/13/2012 Effective date 1/13/2012 Year / Period 2010 1

Invoice 10169 | **New Invoice** Invoice total \$0.00

Customer S

AR Code S & R CONSTRUCTION (34)
706 BROADWAY MUNIS, US 12345

Invoice date SCAVO, MELISSA (11)
5 PARK ST MUNIS, US 12345

Due date SCHMIDT, EDWARD W (56)
29-31 EASTERN AVE MUNIS, US 12345

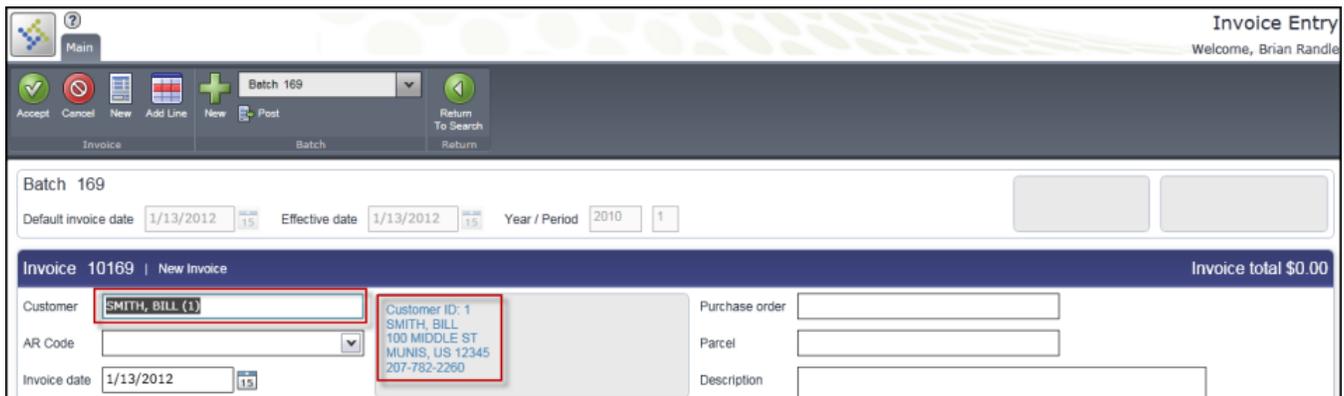
SHARKEY, KIM (9)
90 FISKE ST MUNIS, US 12345

Purchase order

Parcel

Description

Once the customer is selected, the program displays their information in the box to the right of the Customer list.



Invoice Entry
Welcome, Brian Randle

Batch 169

Default invoice date 1/13/2012 Effective date 1/13/2012 Year / Period 2010 1

Invoice 10169 | New Invoice Invoice total \$0.00

Customer **SMITH, BILL (1)**

AR Code

Invoice date 1/13/2012

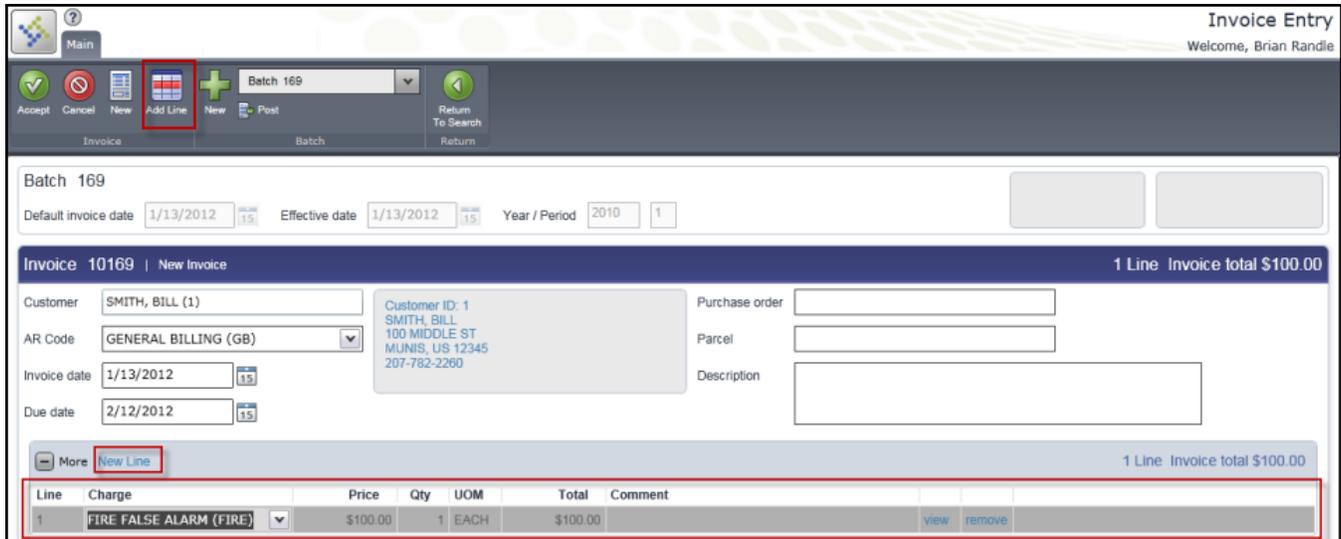
Customer ID: 1
SMITH, BILL
100 MIDDLE ST
MUNIS, US 12345
207-782-2260

Purchase order

Parcel

Description

Enter the rest of the invoice data and then click Add Line in the Invoice menu or click New Line and select the charge code.



Batch 169

Default invoice date 1/13/2012 Effective date 1/13/2012 Year / Period 2010 1

Invoice 10169 | New Invoice 1 Line Invoice total \$100.00

Customer SMITH, BILL (1) Customer ID: 1 SMITH, BILL 100 MIDDLE ST MUNIS, US 12345 207-782-2260

AR Code GENERAL BILLING (GB) Purchase order

Invoice date 1/13/2012 Parcel

Due date 2/12/2012 Description

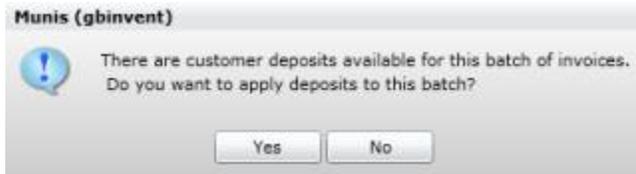
More **New Line** 1 Line Invoice total \$100.00

Line	Charge	Price	Qty	UOM	Total	Comment
1	FIRE FALSE ALARM (FIRE)	\$100.00	1	EACH	\$100.00	view remove

Click Accept to save the invoice and then click Return To Search in the Return menu. Click Post in the Actions menu and the program will redirect you to Invoice Entry in the General Billing menu to complete the transaction.

Invoice Entry and Proof

A prompt displays during the posting of a General Billing batch if deposits exist on the customer's record in Customers.



Munis (gbinvent)

There are customer deposits available for this batch of invoices.
Do you want to apply deposits to this batch?

Yes No

Invoices

The Invoices program allows you to search for a record prior to making an adjustment. Multiple adjustments can be posted within the same program session.

The Invoice Line Adjustments program allows you to use the charge code list to select a fee to apply to the invoice.

Invoice Line Adjustments

Print Invoices

Munis Scheduler is enabled for Print Invoices.

Print Invoices - Munis

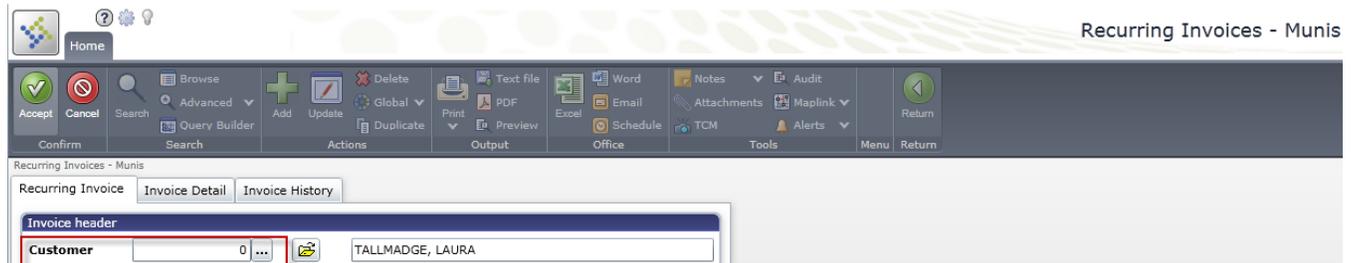
Print Statements

Miscellaneous receipts, associated with a customer ID, are included in the XML export if they have an effective date within the defined invoice date range.

Print Statements - Munis

Recurring Invoices

The Recurring Invoices program includes the Duplicate option on the Actions group of the ribbon. This option allows you to create a new recurring invoice using an existing recurring invoice records as a template. To copy an invoice, click the Duplicate option and enter the customer ID to which to copy the record.



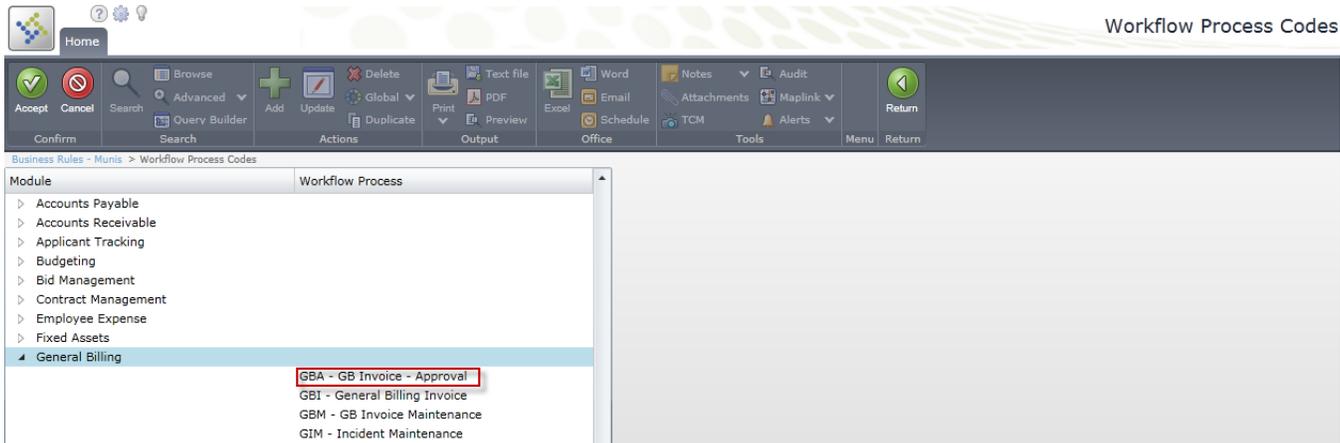
Enter the customer number to copy the record to.

The monthly and yearly recurrence options let you decide whether you will generate a recurring invoice by a relative week of the year or a specific day of the month.

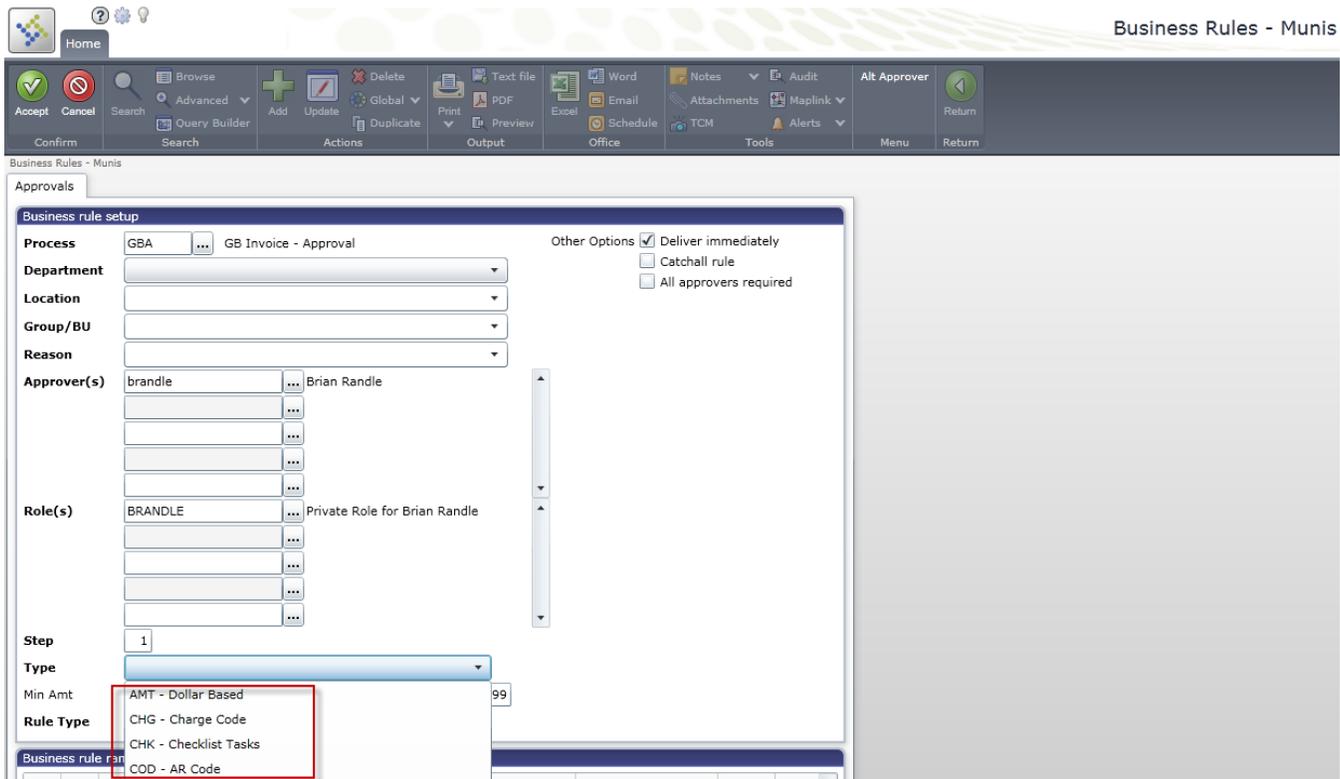


Workflow Business Rules

The following Workflow approval business rules are available to provide workflow for the general billing process: Business rules GBA - GB Invoice Approval.



The General Billing Invoice (GBI) notification and General Billing Approval (GBA) business rules include approval types of amount and AR code.

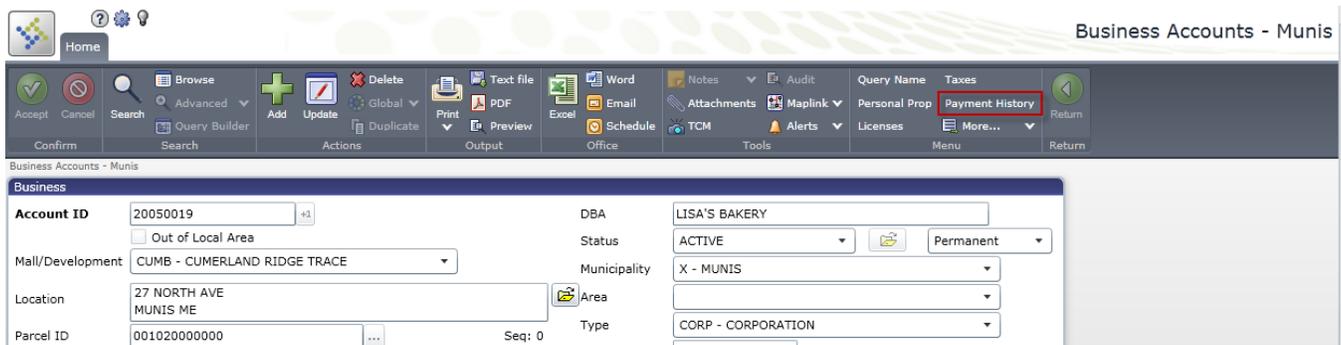


Business Licenses

This section contains major enhancements made to Business License programs or processes for Munis Version 10.1.

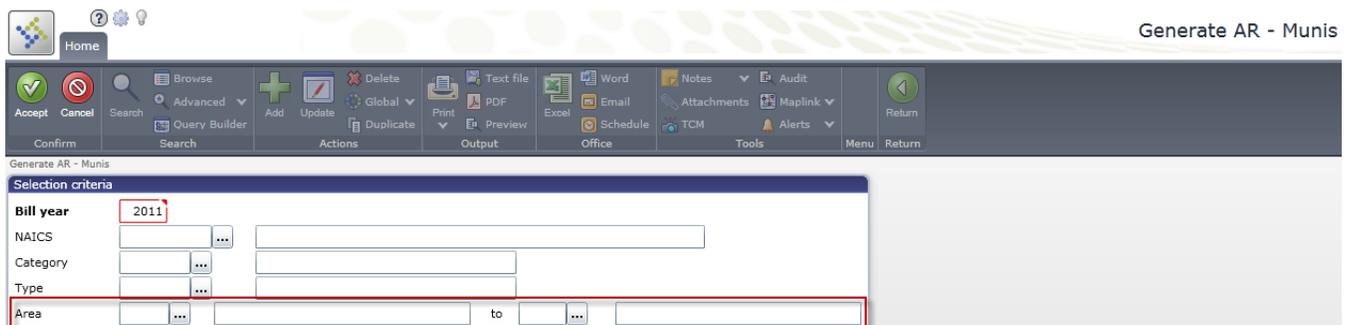
Business Accounts

The Payment History option is available on the main screen. This option displays the AR Receipt Inquiry screen, which shows all receipts for the account.



Generate Accounts Receivable

The Area boxes are available. This allows you to select accounts within a range of geographical areas.



Inactivate Expired Licenses

The Inactivate Expired Licenses program includes the Category, Type, and Cycle code ranges to be used for selecting records.

Inactivate Expired Licenses - Munis

Processing options

Execute: Select licenses with expired bonds

Effective date: Inactivation date:

Account only Select licenses with expired insurance

Category: ... to ...

Type: ... to ...

Cycle code: ... to ...

Print Renewals

The Print Renewals program provides the Include Net Account Balance in Export checkbox. When the checkbox is selected, program will calculate the net bill balance for the renewal forms.

Print Renewals - Munis

Selection criteria

Process:

Cycle code:

Bill year: to

Month: to

Category: ... to ...

Type: ... to ...

NAICS: ... to ...

Delinquent amounts

Include personal property

Include by business ID for category ... to ...

Include by business ID for category ... to ...

Include by business CID for category ... to ...

Include by business CID for category ... to ...

Include audit bills

Include bill for the defined period in delinquent amounts

Include net account balance in the export.

Output

Include copies for each reporting period

Include extra copies for

Annual cycle (1 to 2 reporting periods)

Quarterly cycle (3 to 6 reporting periods)

Monthly cycle (7 to 12 reporting periods)

Include inactive

Include exempt

Compress name/address data

Effective date:

Sequence by:

Range: to

Output type:

History reason:

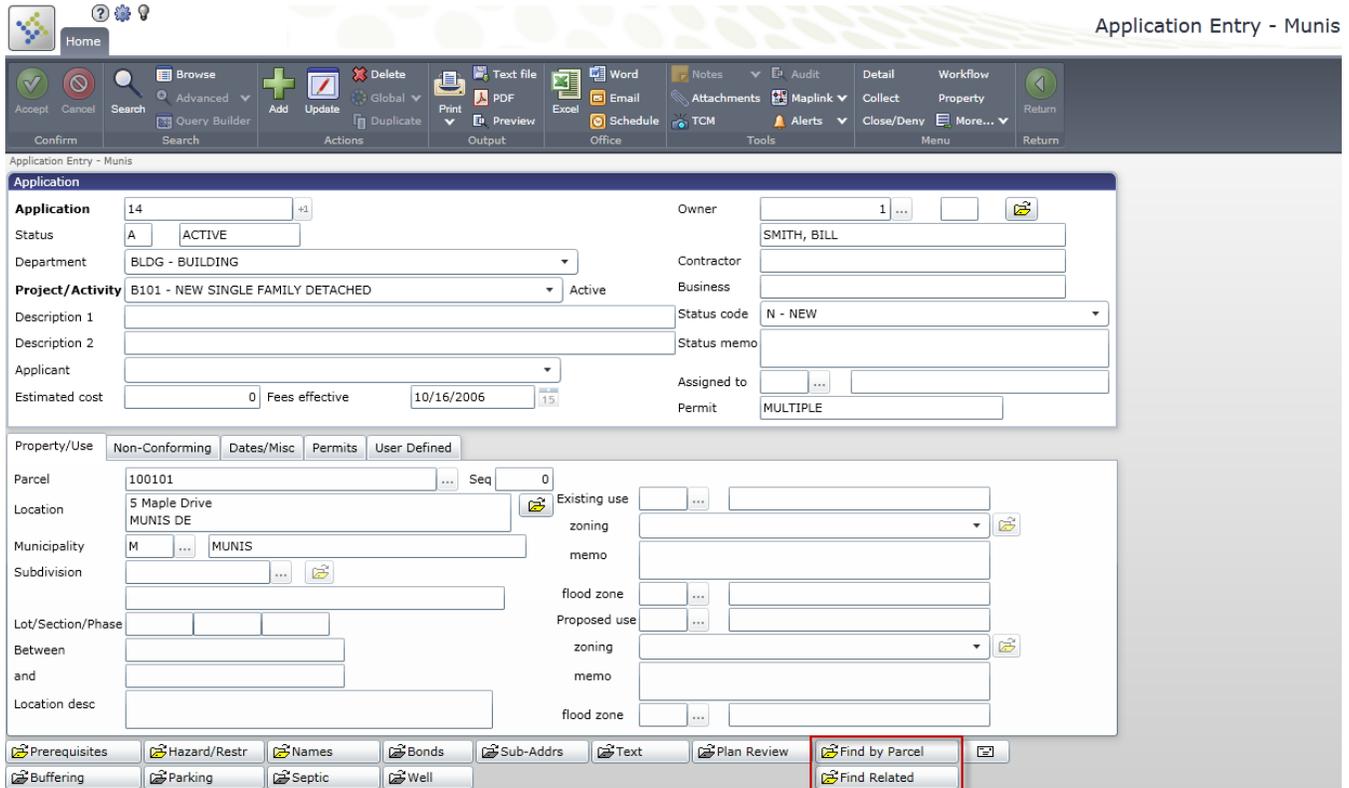
History comment:

Form code:

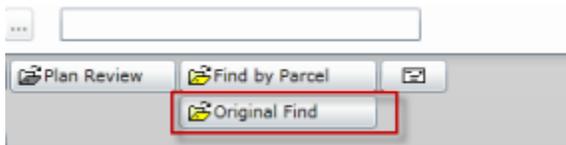
Permits and Code Enforcement

Application Entry

The Find by Parcel and Find Related buttons include the folder image. The folder is highlighted when the program finds associated records for these categories.



When you click Find Related to view related search results, the button label changes to Find Original; click Find Original to return to the original search results.



In the System Administration Role - Permits and Code Enforcement program, you can restrict user access to warning types by selecting Limited from the Warning Types Data Access list and identifying the restricted types on the Warning Types screen. The restriction list includes Property-Overdue Bills and Property-Current Unpaid Bills. If you select both, the Restrictions and Warnings list in Application Entry includes both; if you select Property-Overdue Bills or Property-Current Unpaid Bills, then the Restrictions and Warnings list includes only the bill type selected.

The Permits tab includes the Permit Number field.

The screenshot shows the 'Application Entry - Munis' interface. At the top is a navigation bar with a 'Home' button and a toolbar containing various icons for actions like 'Accept', 'Cancel', 'Search', 'Add', 'Update', 'Delete', 'Print', 'PDF', 'Excel', 'Word', 'Notes', 'Audit', 'Detail', 'Workflow', 'Return', etc.

Below the toolbar is a form titled 'Application' with the following fields:

- Application: 14
- Status: A ACTIVE
- Department: BLDG - BUILDING
- Project/Activity: B101 - NEW SINGLE FAMILY DETACHED (Active)
- Description 1: [Empty]
- Description 2: [Empty]
- Applicant: [Empty]
- Estimated cost: 0 Fees effective: 10/16/2006
- Owner: 1 SMITH, BILL
- Contractor: [Empty]
- Business: [Empty]
- Status code: N - NEW
- Status memo: [Empty]
- Assigned to: [Empty]
- Permit: MULTIPLE

Below the form is a table with tabs for 'Property/Use', 'Non-Conforming', 'Dates/Misc', 'Permits', and 'User Defined'. The 'Permits' tab is selected, showing a table of permits:

Type	Status	Issued	Number	Restrtn	Contractor	Fee Total	Unpaid Amt
PLAN REV	FEE	10/16/2006	A		ABC ELECTRIC	7.50	.00
BLDG EST	REVIEWING		B		ABC ELECTRIC	15.00	.00
ELECTRIC	REVIEWING		E			.00	.00
GAS	REVIEWING		G			.00	.00
MECHANICAL	REVIEWING		M			.00	.00
PLUMBING	REVIEWING		P			.00	.00
SEWER	REVIEWING		X			1,250.00	.00
WATER	REVIEWING		W			1,250.00	.00
COO	REVIEWING		Z			.00	.00

Complaint/Violation Codes

The Status list is available. This list allows you to set the status of the complaint/violation code to Active or Inactive. The List Usage option is available to view the usage of a code before inactivating it.

The screenshot shows the 'Complaint/Violation Codes - Munis' interface. At the top is a navigation bar with a 'Home' button and a toolbar containing various icons for actions like 'Accept', 'Cancel', 'Search', 'Add', 'Update', 'Delete', 'Print', 'PDF', 'Excel', 'Word', 'Notes', 'Audit', 'Detail', 'Workflow', 'Return', etc.

Below the toolbar is a table of codes:

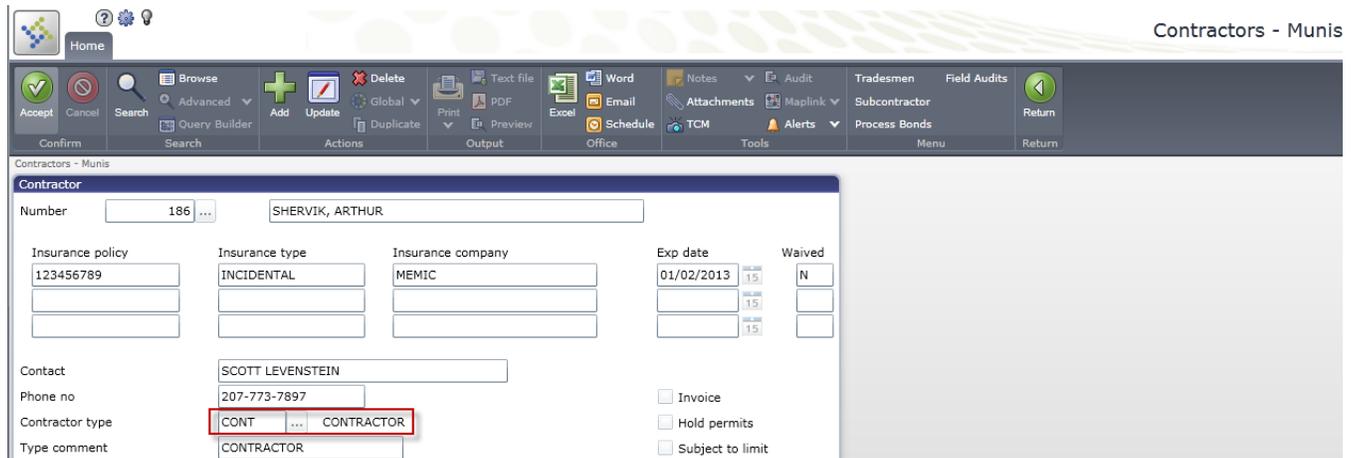
Responsible Dept	Code	Description	Category	Status
CODE	NEW	CORRECTIVE MEASURES	OTHER	A
CODE	V001	TRASH LITTER DEBRIS	OTHER	A
CODE	V002	INOPERABLE VEHICLES	OTHER	A
CODE	V003	BUSINESS IN RESIDENCE	OTHER	A
CODE	V004	WORK WITHOUT PERMIT	OTHER	A
CODE	V005	AT LARGE ANIMAL	OTHER	A
CODE	V006	YARD MAINTENANCE	OTHER	A
CODE	V007	OUTDOOR STORAGE	OTHER	A
CODE	V008	ILLEGAL DWELLING UNITS	OTHER	A
CODE	V009	GARAGE AS ROOM	OTHER	A

Below the table is a form titled 'Complaint/Violation' with the following fields:

- Responsible dept: CODE - CODE
- Code: NEW
- Description: CORRECTIVE MEASURES
- Short description: CORRECTIVE
- Status: Active (dropdown menu)
- Category: Active (dropdown menu)
- Default Inspector: Inactive (dropdown menu)

Contractors

In the Contractors program, the Contractor Type box is available. This field requires miscellaneous codes to define the contractor type; you must create contractor type codes in the Permits and Code Enforcement Miscellaneous Codes program to complete this field. Previously, contractor type was a free-form text box. The Type Comment box replaces the previous contractor type text box and data previously entered in the original Contractor Type text box is included in this box.



Contractors - Munis

Contractor

Number: 186 ... SHERVIK, ARTHUR

Insurance policy: 123456789

Insurance type: INCIDENTAL

Insurance company: MEMIC

Exp date: 01/02/2013

Waived: N

Contact: SCOTT LEVENSTEIN

Phone no: 207-773-7897

Contractor type: **CONT ... CONTRACTOR**

Type comment: CONTRACTOR

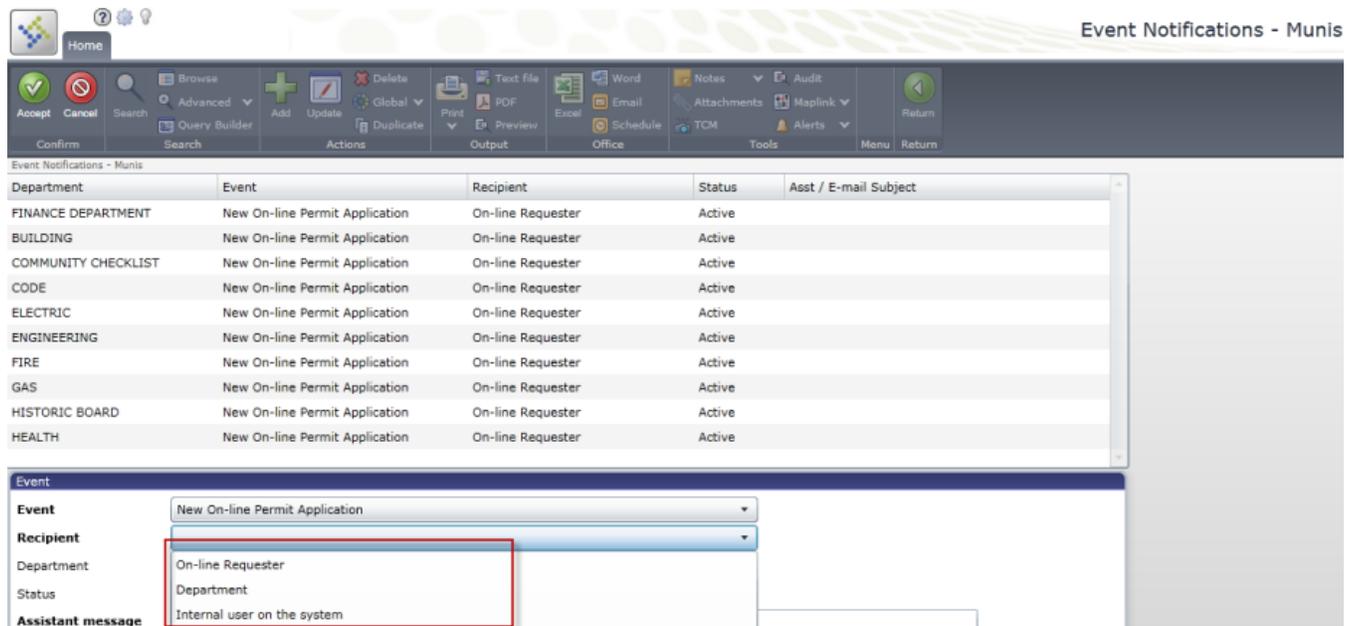
Invoice

Hold permits

Subject to limit

Event Notifications

When the value of the Event list is New On-line Permit Application, the Department and Internal User on the System options are available options on the Recipient list.



Event Notifications - Munis

Department	Event	Recipient	Status	Asst / E-mail Subject
FINANCE DEPARTMENT	New On-line Permit Application	On-line Requester	Active	
BUILDING	New On-line Permit Application	On-line Requester	Active	
COMMUNITY CHECKLIST	New On-line Permit Application	On-line Requester	Active	
CODE	New On-line Permit Application	On-line Requester	Active	
ELECTRIC	New On-line Permit Application	On-line Requester	Active	
ENGINEERING	New On-line Permit Application	On-line Requester	Active	
FIRE	New On-line Permit Application	On-line Requester	Active	
GAS	New On-line Permit Application	On-line Requester	Active	
HISTORIC BOARD	New On-line Permit Application	On-line Requester	Active	
HEALTH	New On-line Permit Application	On-line Requester	Active	

Event

Event: New On-line Permit Application

Recipient: **On-line Requester**

Department: Department

Status: Department

Assistant message: Internal user on the system

Inspection Entry

On the Fees tab, the program displays customer information for the To box for Issue Invoice. The customer ID displays in the box; the customer name displays next to the box. Clicking the To option allows you to change the Customer ID number to be invoiced.

Inspection Entry - Munis

Inspection

Inspection ID: 435 Source: MANUAL Violation ref: []

Originating dept: BLDG - BUILDING Application ref: []

Parcel: 001003000000 Seq: 0 Project/Activity: []

Location: 21 BAY AVE License number: [] License location: []

MUNIS ME Inspection Area: []

Municipality: [] Lot number: []

Main Fees Req/Misc

Fee code: []

Qty/Units: 1

Fee amount: .00

Credit amount: .00

Paid to date: .00

Balance due: .00

Issue invoice N [] To 49 WARD, DAVID A

Inspection Types

The Inspection Type program includes the Require Results Pass/Fail Indicator checkbox. If this checkbox is selected, it causes the Inspection Entry program to make the Results box (Pass/Fail) a mandatory field.

Inspection Types - Munis

Level	Code	Description	Department	Inspector	Trade Type	Status
0	I011	FOOTING #1	BUILDING			A
0	I012	FOOTING #2	BUILDING			A
0	I013	FOOTING #3	BUILDING			A
0	I021	FOUNDATION #1	BUILDING			A
0	I022	FOUNDATION #2	BUILDING			A
0	I023	FOUNDATION #3	BUILDING			A
0	I031	FRAMING #1	BUILDING			A

Inspection Type

Code: I011

Description: FOOTING #1

Short description: FOOTING #1

Status: Active

Department: BLDG - BUILDING

Inspector: []

Results:

Pass result: P - PASS

Fail result: F - FAIL

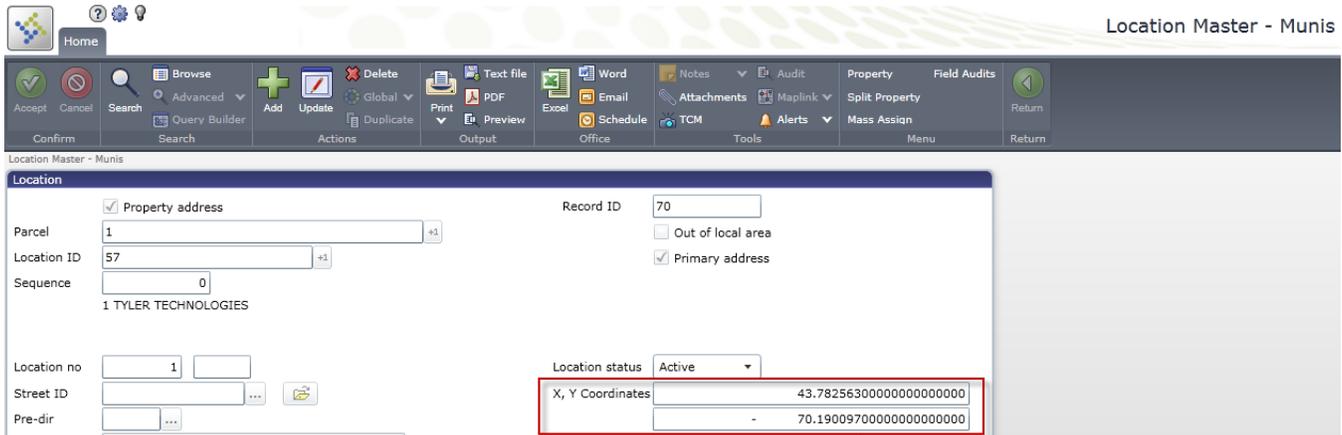
Reinspection: I012 - FOOTING #2

Active

Require results pass/fail indicator

Location Master

The X, Y Coordinates boxes are available. Use these boxes to identify the X and Y GIS coordinates for a location. The X,Y Coordinates values identify locations that are not based on specific property addresses.



Location Master - Munis

Property address Record ID: 70

Parcel: 1 Out of local area

Location ID: 57 Primary address

Sequence: 0

1 TYLER TECHNOLOGIES

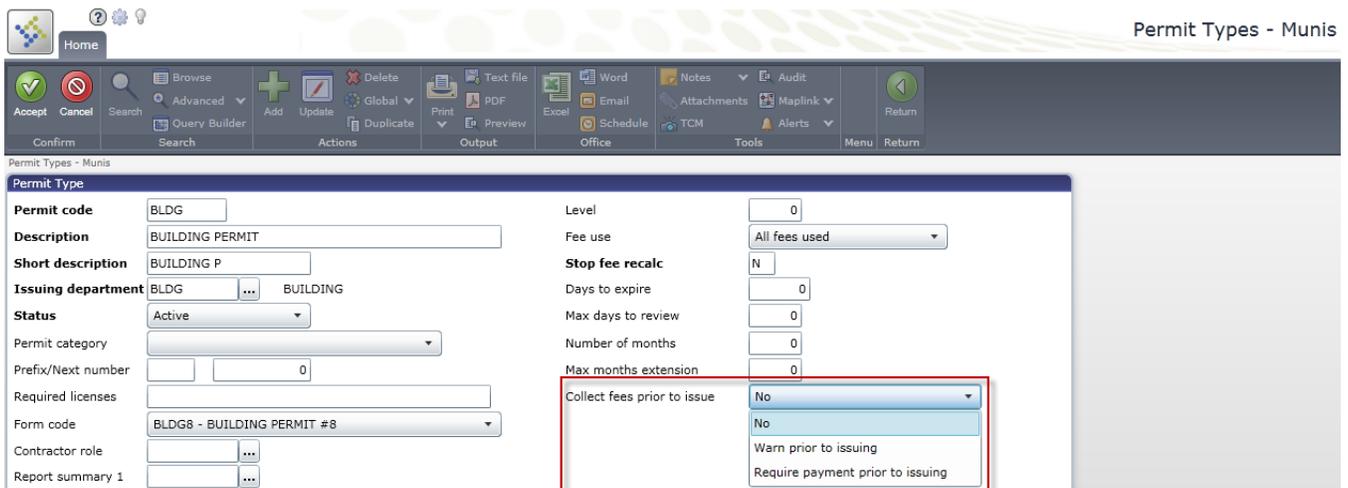
Location no: 1 Location status: Active

Street ID: Pre-dir:

X, Y Coordinates: 43.7825630000000000000000
70.1900970000000000000000

Permit Types

The Collect Fees Prior to Issue list is available. Use this list to set collection rules for the permit. This allows you to require payment prior to issuing the permit, to generate a collection warning prior to issuing the permit, or to negate the need to collect fees prior to issue the permit. When you create a new permit, the Application Entry program displays a collection message, if appropriate, according to the collection setting.



Permit Types - Munis

Permit code: BLDG Level: 0

Description: BUILDING PERMIT Fee use: All fees used

Short description: BUILDING P Stop fee recal: N

Issuing department: BLDG BUILDING Days to expire: 0

Status: Active Max days to review: 0

Permit category: Prefix/Next number: 0 Number of months: 0

Required licenses: Max months extension: 0

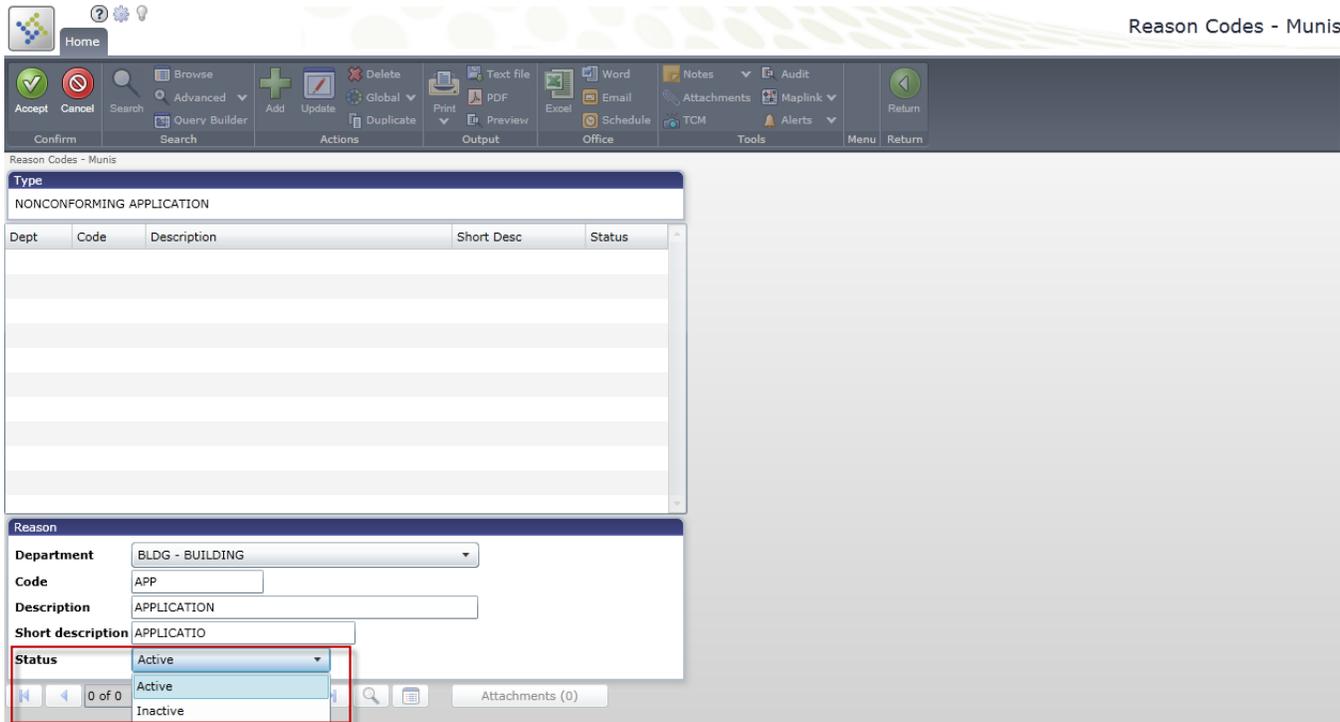
Form code: BLDGS - BUILDING PERMIT #8 Collect fees prior to issue: No

Contractor role: Warn prior to issuing

Report summary 1: Require payment prior to issuing

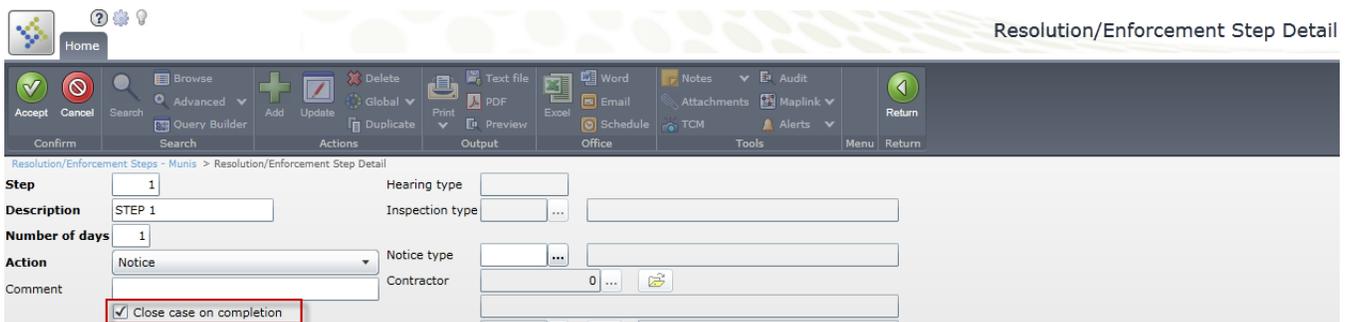
Reason Codes

The program includes the Status list. This list determines if the reason code is active or inactive. If the status is inactive, the code cannot be assigned in those programs requiring reason codes.



Resolution/Enforcement Steps

The Close Case on Completion checkbox is available on the Resolution/Enforcement Step Detail screen. When you select this checkbox, the program prompts you to close the complaint/violation when the step is completed.



Munis Self Service

The Munis Self Service programs available for the Revenues product are included in Citizen Self Service (CSS). This section provides details for enhancements made to applications in CSS for version 10.1.

Citizen Self Service Enhancements

CSS gives citizens Web-based access to municipal services and information and allows them to view or pay bills. A citizen’s ability to pay bills or to view or access bill or customer information in CSS is dependent on his or her user permissions.

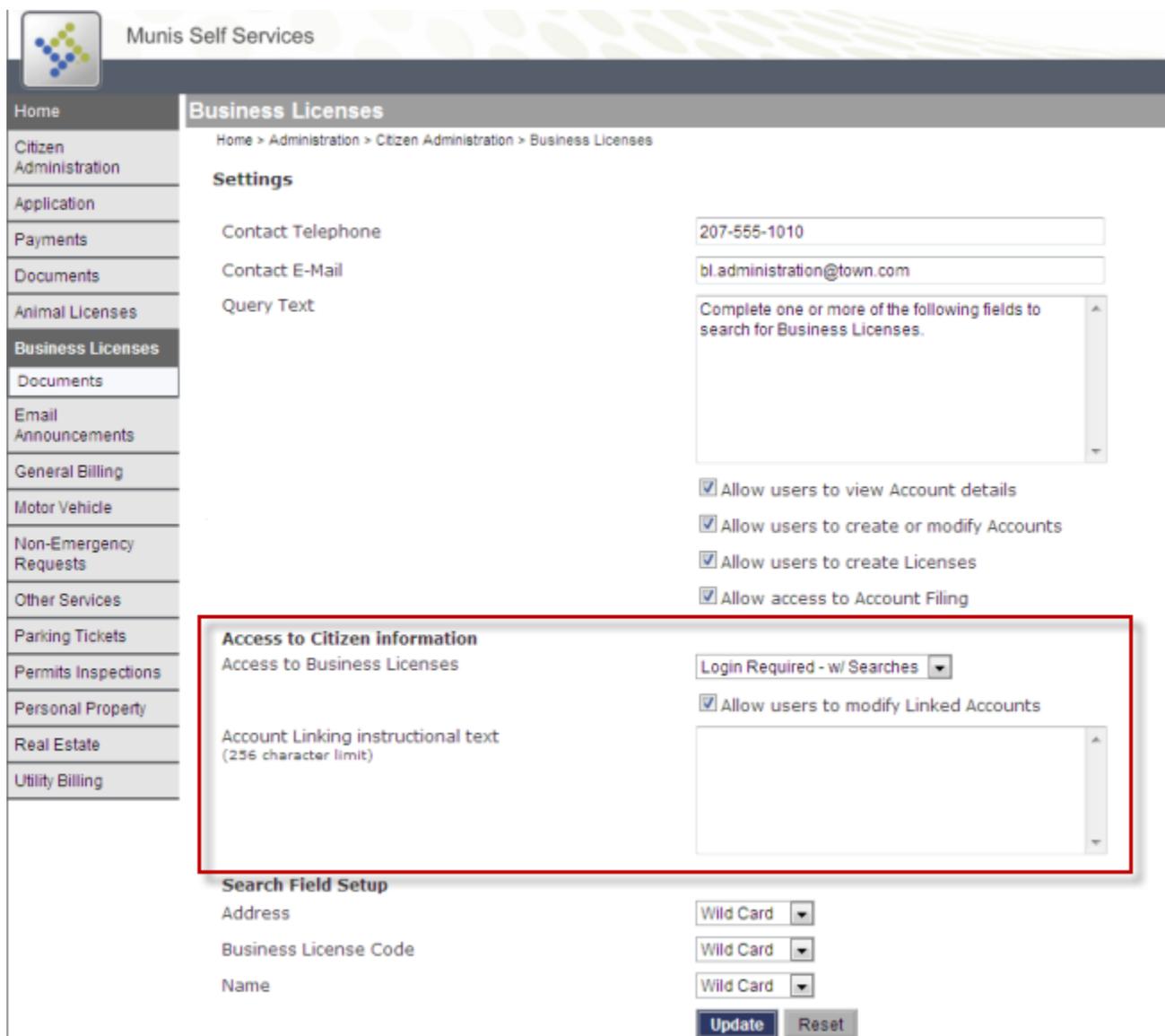
Account Linking

Account linking is generally enabled. The Enable/Disable Account Linking checkbox indicates if citizen users are allowed to modify their linked accounts. Citizen user permissions to manage their own linked accounts are determined by administration settings.

Citizen module access settings

Module	User Access Setting	Account Link Modification by User
Animal Licenses	No Login Required	n/a edit
Business Licenses	Login Required - w/ Searches	Enabled edit
General Billing	No Login Required	n/a edit
Motor Vehicle	No Login Required	n/a edit
Parking Tickets	No Login Required	n/a edit
Permits Inspections	No Login Required	Disabled edit
Personal Property Tax	No Login Required	Disabled edit
Real Estate Tax	No Login Required	n/a edit
Utility Billing	No Login Required	Disabled edit

Administration controls that enable and disable account linking, and those that control CSS module access, are removed from the CSS Administration Applications Settings page and are available on the associated module pages. For example, Permits access and account linking controls are available on the Permits administration page, accessed from CSS Administration.



Munis Self Services

Business Licenses

Home > Administration > Citizen Administration > Business Licenses

Settings

Contact Telephone: 207-555-1010

Contact E-Mail: bl.administration@town.com

Query Text: Complete one or more of the following fields to search for Business Licenses.

- Allow users to view Account details
- Allow users to create or modify Accounts
- Allow users to create Licenses
- Allow access to Account Filing

Access to Citizen information

Access to Business Licenses: Login Required - w/ Searches

Allow users to modify Linked Accounts

Account Linking instructional text (256 character limit)

Search Field Setup

Address: Wild Card

Business License Code: Wild Card

Name: Wild Card

Update Reset

Account link instructions are provided for each module that provides account linking. This text is maintained on the associated module administration page and displays to citizen users on the account linking page where they create linked accounts. Also on this account linking page, validation of account link values occurs and required value indicators assist citizen users in completing account linking.

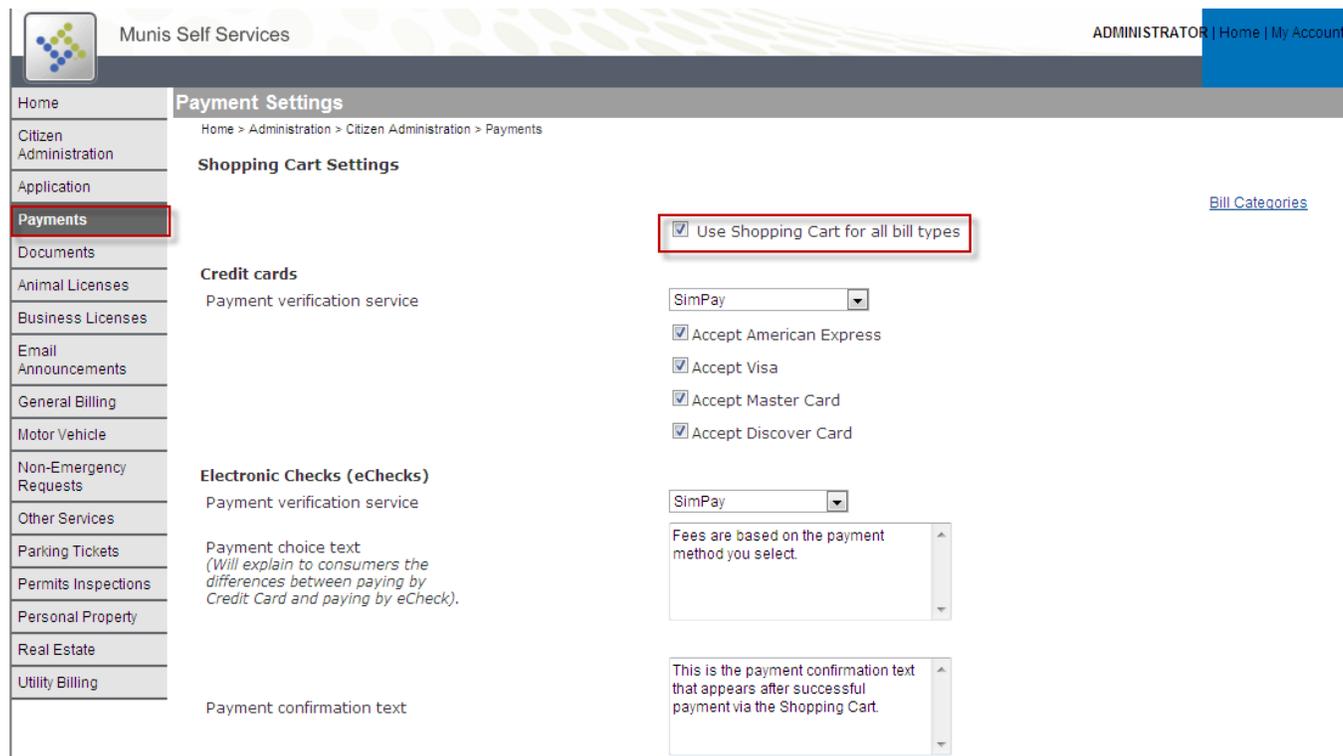
The CSS Administration Application Settings page provides a Citizen Module Access Settings summary table. This table displays the account linking settings for each active CSS module and provides links to the associated module administration page.

Citizen module access settings

Module	User Access Setting	Account Link Modification by User
Animal Licenses	No Login Required	n/a edit
Business Licenses	Login Required - w/ Searches	Enabled edit
General Billing	No Login Required	n/a edit
Motor Vehicle	No Login Required	n/a edit
Parking Tickets	No Login Required	n/a edit
Permits Inspections	No Login Required	Disabled edit
Personal Property Tax	No Login Required	Disabled edit
Real Estate Tax	No Login Required	n/a edit
Utility Billing	No Login Required	Disabled edit

Payments Administration

The Use Shopping Cart for all Bill Types checkbox is available on the Payments Administration page. When this option is selected, the credit card and eCheck payment verification settings will be used for all bill types for which Web payments are enabled. This allows you to pay multiple bills from multiple categories (for example Real Estate and Utility Billing bills) at the same time using the Shopping Cart functionality.



Munis Self Services ADMINISTRATOR | Home | My Account

Home **Payment Settings**
 Home > Administration > Citizen Administration > Payments

Shopping Cart Settings [Bill Categories](#)

Use Shopping Cart for all bill types

Credit cards
 Payment verification service: SimPay

Accept American Express
 Accept Visa
 Accept Master Card
 Accept Discover Card

Electronic Checks (eChecks)
 Payment verification service: SimPay

Payment choice text
(Will explain to consumers the differences between paying by Credit Card and paying by eCheck).

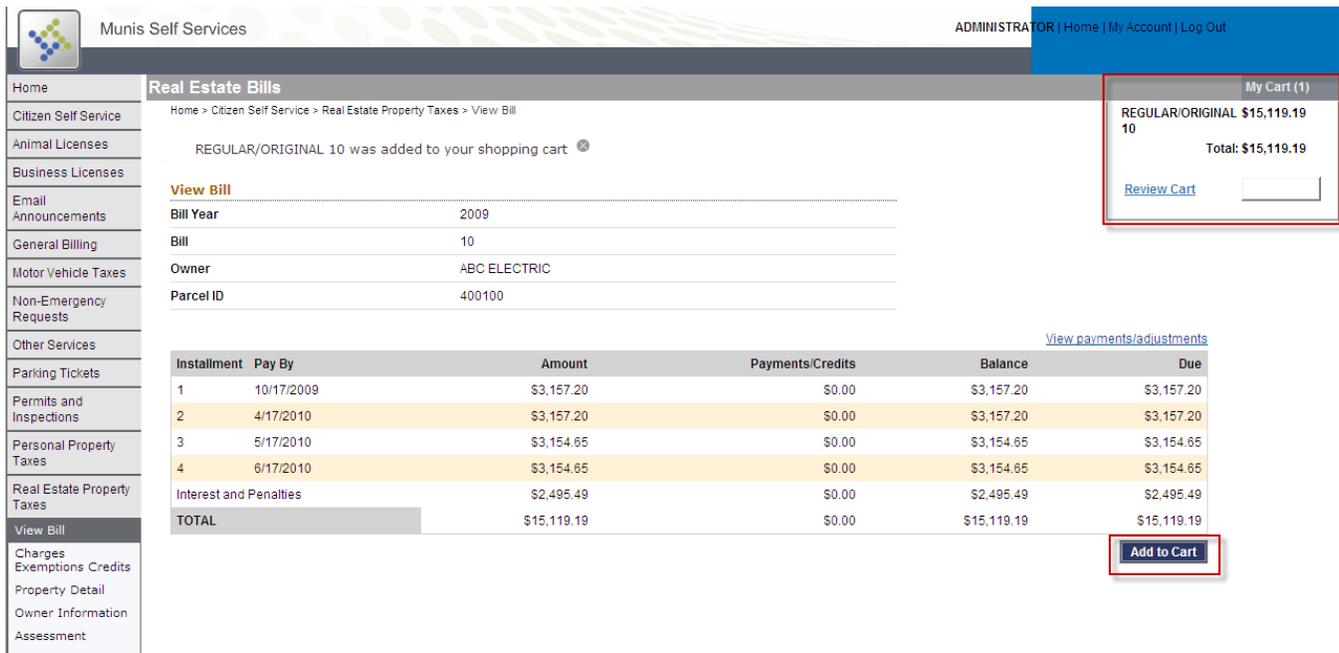
Payment confirmation text
 This is the payment confirmation text that appears after successful payment via the Shopping Cart.

You can access bill category-specific settings, such as Overpayments Not Allowed or Prevent Payments if Prior Bills Exist, by clicking Edit for the bill category in the table at the bottom of the screen.

Bill Categories

Description	Web Payments	
ANIMAL LICENSES	Enabled	edit
BUSINESS LICENSES	Enabled	edit
GENERAL BILLING & MISC CASH	Enabled	edit
MOTOR VEHICLE	Enabled	edit
OTHER SERVICES (MISC RECEIPTS)	Enabled	edit
PARKING TICKETS	Enabled	edit
PERMITS INSPECTIONS	Disabled	edit
PERSONAL PROPERTY	Enabled	edit
REAL ESTATE	Enabled	edit
TAX LIEN	Enabled	edit
UB ASSESSMENTS	Enabled	edit
UB SERVICES - GENERAL	Enabled	edit

When you are using the Shopping Cart for bill payments, the My Cart option is available on the toolbar in Citizen Self Service. You can only view the Shopping Cart once you have added at least one item.



Munis Self Services ADMINISTRATOR | Home | My Account | Log Out

Home | **Real Estate Bills** | My Cart (1)

Citizen Self Service: Home > Citizen Self Service > Real Estate Property Taxes > View Bill

Animal Licenses: REGULAR/ORIGINAL 10 was added to your shopping cart

Business Licenses: **View Bill**

Email Announcements: **Bill Year** 2009

General Billing: **Bill** 10

Motor Vehicle Taxes: **Owner** ABC ELECTRIC

Non-Emergency Requests: **Parcel ID** 400100

Other Services: [View payments/adjustments](#)

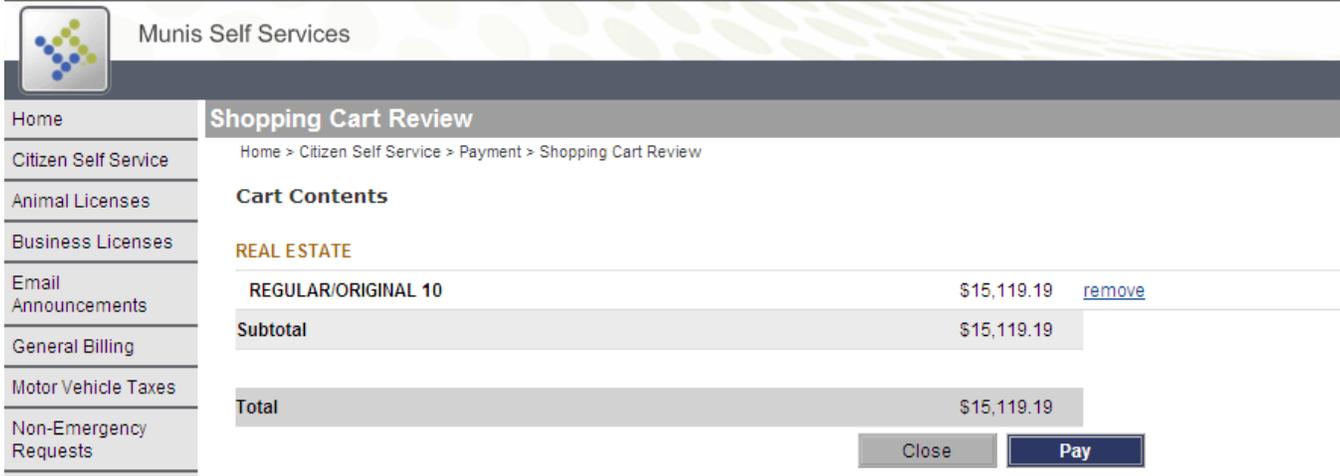
Installment	Pay By	Amount	Payments/Credits	Balance	Due
1	10/17/2009	\$3,157.20	\$0.00	\$3,157.20	\$3,157.20
2	4/17/2010	\$3,157.20	\$0.00	\$3,157.20	\$3,157.20
3	5/17/2010	\$3,154.65	\$0.00	\$3,154.65	\$3,154.65
4	6/17/2010	\$3,154.65	\$0.00	\$3,154.65	\$3,154.65
Interest and Penalties		\$2,495.49	\$0.00	\$2,495.49	\$2,495.49
TOTAL		\$15,119.19	\$0.00	\$15,119.19	\$15,119.19

REGULAR/ORIGINAL 10 **\$15,119.19**
Total: **\$15,119.19**
[Review Cart](#)

Add to Cart

On the bill screens, click Add to Cart to see the amount added to My Cart in the upper right corner of the screen.

Click Review Cart to see the amount specified for payment and process the payment or remove the item from the Shopping Cart.



Munis Self Services

Shopping Cart Review
Home > Citizen Self Service > Payment > Shopping Cart Review

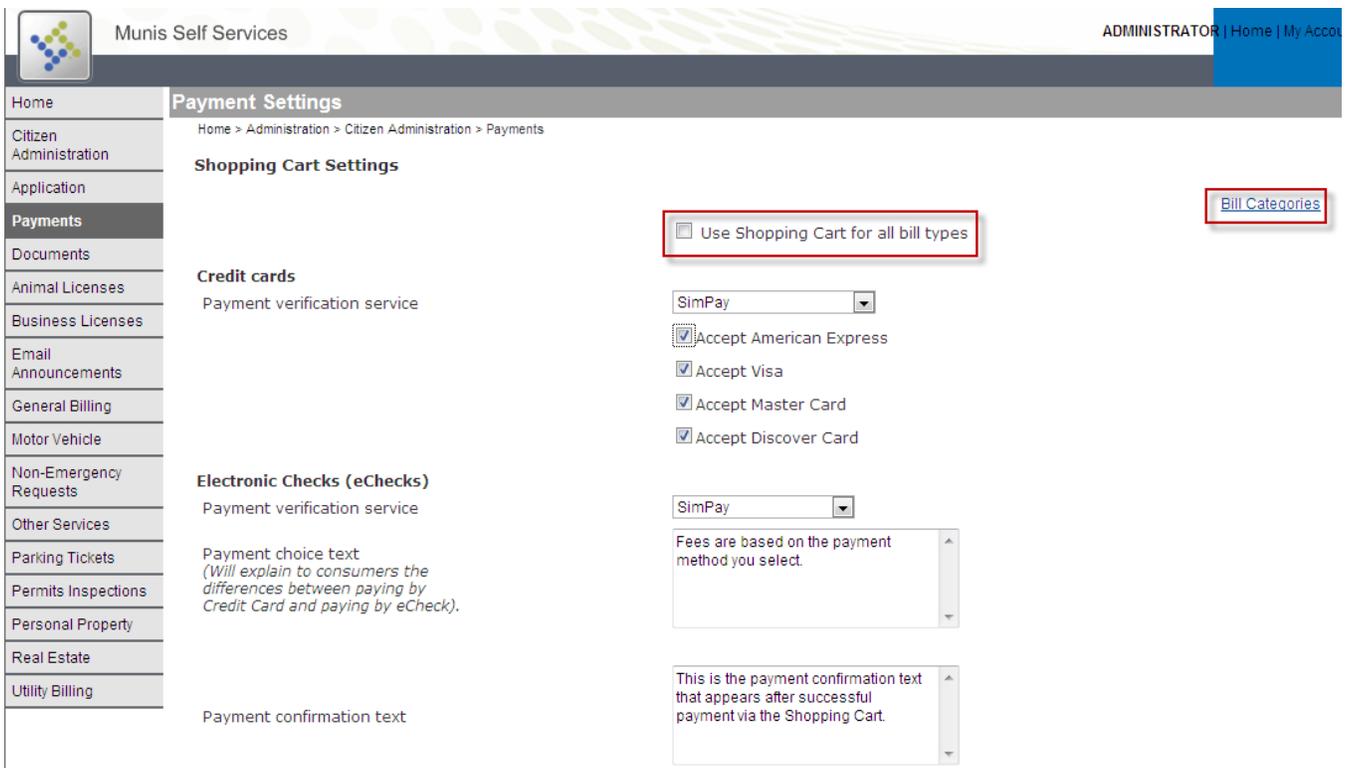
Cart Contents

REAL ESTATE

REGULAR/ORIGINAL 10	\$15,119.19	remove
Subtotal	\$15,119.19	
Total	\$15,119.19	

Close Pay

To disable the Shopping Cart, you can uncheck the checkbox in Payments Administration and establish the payment providers for each bill category by clicking Edit in the Bill Categories section at the bottom of the page. You can click the Bill Categories link at the top of the page to quickly navigate to the Bill Categories table.



Munis Self Services ADMINISTRATOR | Home | My Account

Payment Settings
Home > Administration > Citizen Administration > Payments

Shopping Cart Settings

Use Shopping Cart for all bill types [Bill Categories](#)

Credit cards
Payment verification service: SimPay

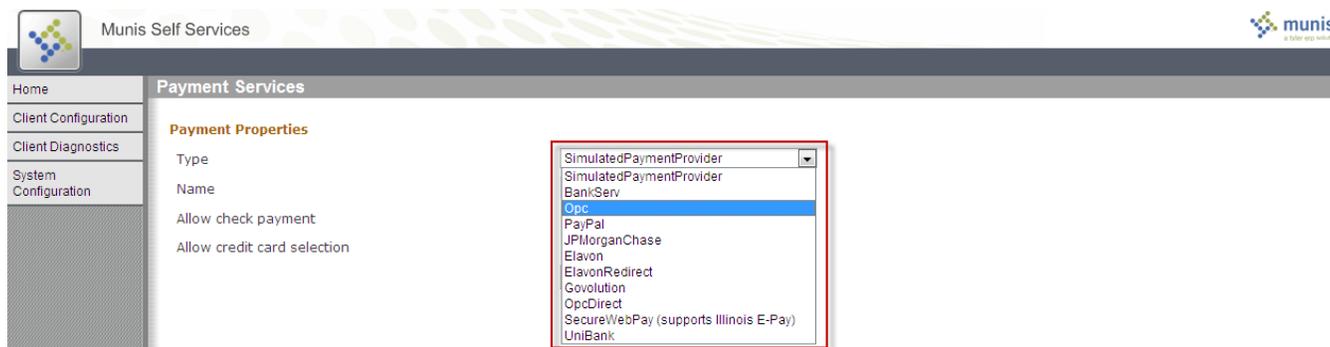
- Accept American Express
- Accept Visa
- Accept Master Card
- Accept Discover Card

Electronic Checks (eChecks)
Payment verification service: SimPay

Payment choice text
(Will explain to consumers the differences between paying by Credit Card and paying by eCheck).

Payment confirmation text
This is the payment confirmation text that appears after successful payment via the Shopping Cart.

The Secure Web Payments (SWP) and UniBank payment gateways are available. When the SWP payment gateway is used, CSS redirects citizens to the payment gateway provider's online bill payment Web site to complete a payment.



When the selected payment service type is OPC, updated gateway settings allow the payment confirmation process to complete without opening a new window in the user's browser. On the OPC Payment Configuration page of Payment Services, the Enable Use of Postback URL for Silent Payment Confirmation checkbox is available. When you select this checkbox and the Postback URL box has no value, the program completes the box with the correct postback URL for the CSS payment confirmation request handler. This URL includes payment service (svc) and client ID (client) query string values. Administrators can manually change this URL, as required. The Return URL and Error URL boxes provide optional URL values for additional confirmation information. For the OPC Payment type, customers without a customer ID value can successfully make payments.

Permits and Code Enforcement

Customers and contractors can log into Permits and Inspections in Citizen Self Service. Applicants will only see their own applications and contractors will only see general details and applications/permits/inspections that are tied to their customer ID and records.

- Home
- Citizen Self Service
- Animal Licenses
- Business Licenses
- Email Announcements
- General Billing
- Motor Vehicle Taxes
- Non-Emergency Requests
- Other Services
- Parking Tickets
- Permits and Inspections**
- Contact Us
- Personal Property Taxes
- Real Estate Property Taxes
- Tax Relief
- Utility Bills

Permits and Inspections

Home > Citizen Self Service > Permits and Inspections

Complete one or more of the following fields to search for permits and inspections.

Location

Number

Street name

Owner or Contractor

Name

ID

Parcel ID

Application reference

Status

Active Applications only

Unperformed Inspections only

Search

- Home
- Citizen Self Service
- Animal Licenses
- Business Licenses
- Email Announcements
- General Billing
- Motor Vehicle Taxes
- Non-Emergency Requests
- Other Services
- Parking Tickets

Permits and Inspections

Home > Citizen Self Service > Permits and Inspections > Search Results

Search Results

[4 Applications](#) | [42 Inspections](#)

[Modify Search](#) | [New Search](#)

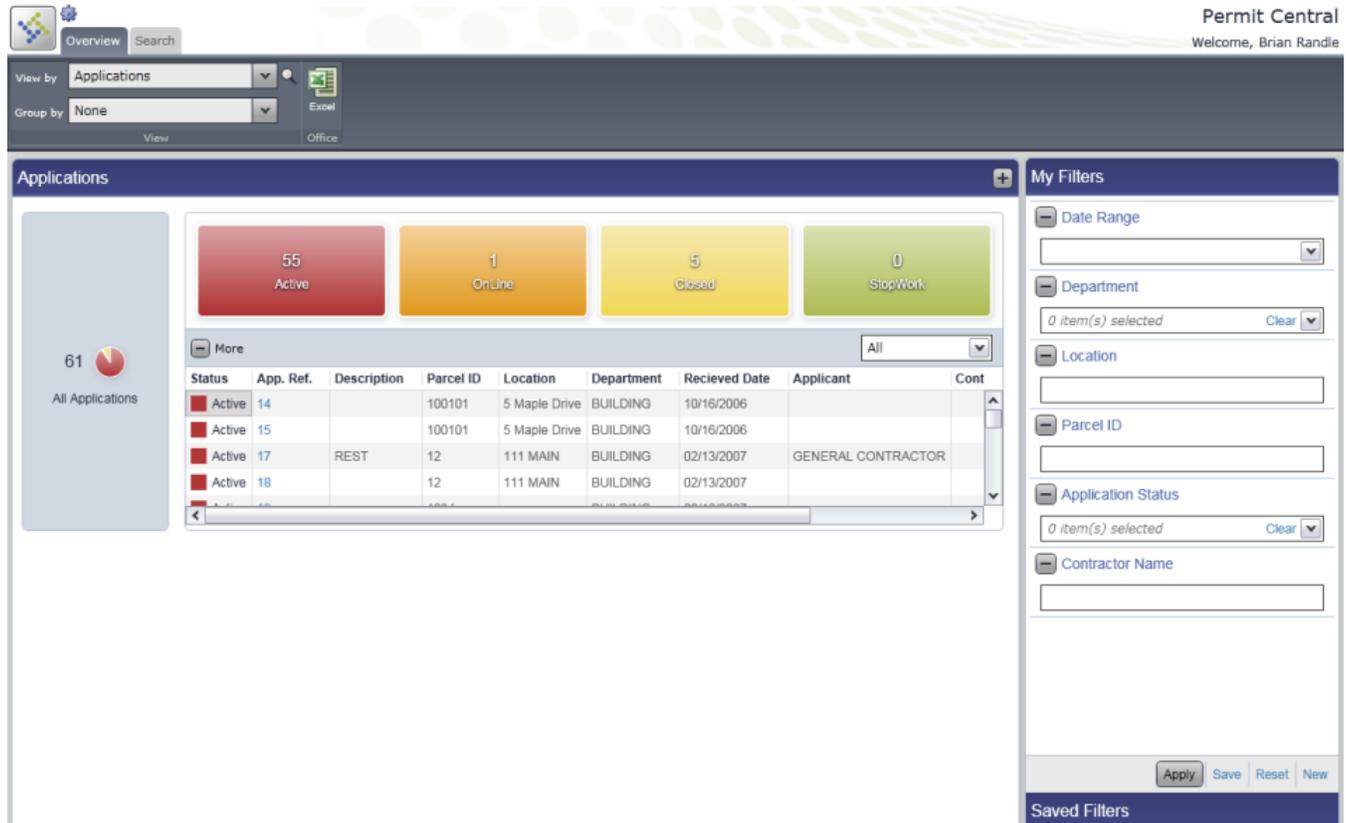
Applications (4 found)

Location/Subdivision	Owner/Contractor	Parcel ID	Status	Reference	Permit Fees	Balance Due	
23 BAY AVE	TALLMADGE, LAURA	001002000000	ACTIVE	56	\$2,522.50	\$2,522.50	View Details
23 BAY AVE	TALLMADGE, LAURA / SHERVIK, ARTHUR	001002000000	ACTIVE	91	\$2,955.00	\$2,955.00	View Details
28 Mackey Terr / HICKORY HILL ESTATES	TALLMADGE, LAURA	001002000000	COMPLETE	7	\$0.00	\$0.00	View Details
28 Mackey Terr / HICKORY HILL ESTATES	TALLMADGE, LAURA / P B G CONSTRUCTION	001002000000	COMPLETE	8	\$4,364.75	\$0.00	View Details

Centrals

Permits Central

The Permits Central program is available on the Munis Application > Other Applications > Centrals menu. This program provides an overview of your organization's permit activity in Munis Permits and Code Enforcement. The Advanced Search and My Filters options are available.



The screenshot displays the Permit Central web application interface. At the top right, it says "Permit Central" and "Welcome, Brian Randle". The main navigation bar includes "Overview" and "Search". Below this, there are dropdown menus for "View by" (set to "Applications") and "Group by" (set to "None"). There are also "Excel" and "Office" icons.

The main content area is titled "Applications" and features a dashboard with four colored boxes representing application status counts:

- 55 Active (red box)
- 1 OnLine (orange box)
- 5 Closed (yellow box)
- 0 StopWork (green box)

Below the dashboard is a table of applications. The table has columns for Status, App. Ref., Description, Parcel ID, Location, Department, Received Date, Applicant, and Cont. The first four rows are highlighted in red, indicating they are active. The first row shows an application with App. Ref. 14, Description, Parcel ID 100101, Location 5 Maple Drive, Department BUILDING, and Received Date 10/16/2006. The second row shows App. Ref. 15, Description, Parcel ID 100101, Location 5 Maple Drive, Department BUILDING, and Received Date 10/16/2006. The third row shows App. Ref. 17, Description REST, Parcel ID 12, Location 111 MAIN, Department BUILDING, Received Date 02/13/2007, and Applicant GENERAL CONTRACTOR. The fourth row shows App. Ref. 18, Description, Parcel ID 12, Location 111 MAIN, Department BUILDING, and Received Date 02/13/2007.

On the left side, there is a sidebar with a "61 All Applications" indicator. On the right side, there is a "My Filters" panel with several filter categories:

- Date Range: A dropdown menu.
- Department: A dropdown menu with "0 item(s) selected" and a "Clear" button.
- Location: A text input field.
- Parcel ID: A text input field.
- Application Status: A dropdown menu with "0 item(s) selected" and a "Clear" button.
- Contractor Name: A text input field.

 At the bottom of the filter panel, there are buttons for "Apply", "Save", "Reset", and "New". Below the filter panel is a "Saved Filters" section.

Application Reference 14
5 Maple Drive

Parcel ID 100101 Owner SMITH, BILL
Applicant Contractor

Active 33%
% Complete

Prerequisites (3) ██████████
Inspections (12) ██████████
Reviews (2) ██████████
Fees (6) ██████████
Permits (10) ██████████

Alerts (11)
Warnings (4)

Alerts

Condition	Date	Department	Proj. Description
All fees paid, no credits		BUILDING	NEW SINGLE FAMILY DETACHED
Permit Expiration due	10/16/2007	BUILDING	NEW SINGLE FAMILY DETACHED
Permit Review By due	10/23/2006	BUILDING	NEW SINGLE FAMILY DETACHED
Permit Review By due	10/23/2006	BUILDING	NEW SINGLE FAMILY DETACHED
Permit Review By due	10/23/2006	BUILDING	NEW SINGLE FAMILY DETACHED
Permit Review By due	10/23/2006	BUILDING	NEW SINGLE FAMILY DETACHED

Escrow

Action	Date	Amount	Balance	Comments
Escrow Deposit collected	02/12/2009	\$1,000.00	\$1,000.00	Escrow Deposit collected. Permit I
Escrow applied to permit	02/12/2009	(\$7.50)	\$992.50	Permit fee collected against escro
Escrow applied to permit	02/12/2009	(\$15.00)	\$977.50	Permit fee collected against escro
Escrow applied to permit	02/12/2009	(\$977.50)	\$0.00	Permit fee collected against escro

Property Central

The Parcel Inquiry and Personal Property Inquiry hyperlinks in the Property Central program are replaced with hyperlinks to the Parcels and Personal Property programs.

Properties

001002000000
23 BAY AVE, MUNIS

TALLMADGE

View Map | View/Maintain

Parcel Information

Alt Parcel	272729783000015120
Municipality	MUNIS
Status	Active
General Use	
Subdivision	
Zone	
Jurisdiction	

Actions

- Pay Balance
- Permit Application
- Violation Entry
- Tax Corrections
- Tax Statement

Maintenance

- Parcels**
- Personal Property**
- Property Master
- Customers
- Business Master

Inquiry

- Bill Inquiry
- Utility Billing Inquiry

MUNIS US 12345

A Tax Values pane is available on the Details page for records that include tax details. Jurisdiction and Class details are always visible, including when Property Master data is available.

Tax Values					
Class	Type	Size	Assessed	Deferred	Net
SINGLE FAMILY	LAND	1.000 acres	100000	0	100000
SINGLE FAMILY	BUILDING	0	100000	0	100000
Totals	Assessed	Deferred	Net		
	200000	0	200000		